

Special Board Meeting
Wednesday, September 18, 2019 3:00 PM

District Office Board Room
11 N. Royal Ave
Eagle Point, Oregon 97524

Agenda

1. Call to Order
2. Roll Call
3. Pledge of Allegiance
Presenter: Mr. Hodges
4. Superintendent Search
Presenter: Mr. Hodges
 - 4.A. Interviews

A Proposal to the Eagle Point School Board for a Superintendent Search



EAGLE POINT
— **SCHOOL DISTRICT 9** —
Every Student - Every Class - Every Day!

Human Capital Enterprises believes it uniquely has the expertise to support the Eagle Point School District through its upcoming leadership transition. As a leading Oregon Superintendent Search Firm, we pride ourselves on searches conducted with exceptional service to our Boards and widely respected attention to detail – with the highest level of integrity in the process. Our deep local ties combined with our connection to the national community allows us to bring the best candidates to the Eagle Point Board from across Oregon, the rest of the Pacific Northwest, and throughout the country. We encourage you to contact our recent clients and would be delighted to visit with you in person to discuss how we might serve you exceptionally well.

Respectfully Submitted for Consideration,
August 29, 2019



HUMAN CAPITAL ENTERPRISES
REDEFINING HUMAN RESOURCES LEADERSHIP

Hank Harris, President of Human Capital Enterprises (HCE), proposes to conduct a search for an outstanding and highly qualified Superintendent of Schools for the Eagle Point School District. Human Capital Enterprises is a small sole proprietorship owned and operated by Hank Harris, who is well-versed in this work, well-known in the Pacific Northwest and who has built a strong nationwide reputation for professionalism and expertise in public school district leadership searches. For Superintendent Searches, Hank Harris co-brands his searches with the national superintendent search firm Hazard Young Attea & Associates, (hyasearch.com.) Throughout this proposal, the HCE acronym is also used to refer to the HCE/Hazard Young & Attea partnership.

Hank has worked as a search consultant as well as a Board and Superintendent consultant to several districts around the region, some of which include:

Oregon

- Ashland
- **Beaverton**
- Brookings
- Central Point
- Eugene
- Forest Grove
- **Greater Albany**
- Hermiston
- **Lebanon**
- Lincoln County
- **Linn-Benton-Lincoln ESD**
- **Medford**
- **North Clackamas**
- Northwest Regional ESD
- **Portland Public**
- Sherwood
- South Coast ESD
- Willamette ESD

Washington

- Bellingham
- **Central Kitsap**
- Marysville
- North Central ESD
- Olympia
- **Richland**
- Spokane
- **Wenatchee**

Outside of the Pacific Northwest

- Fairfax County, Virginia
- Fulton County, Georgia
- Henrico County, Virginia
- Portsmouth, Virginia
- **Prince George's County, Maryland**
- **Richmond, Virginia**
- Stevens Point, Wisconsin

All Districts in bold above represent Districts where a Superintendent or Assistant/Deputy Superintendent Search took place. We wholeheartedly encourage you to contact as many of our clients as possible to learn first-hand about the Human Capital Enterprises difference. A number of them are listed below.

District Name	Board Liaison	Phone
Beaverton School District (OR)	Anne Bryan	503.679.5040
Central Kitsap School District (WA)	Jeanne Schulze	360.908.5001
Greater Albany Public Schools (OR)	Jennifer Ward	541.730.2270
Medford School District (OR)	Cynthia Wright Suzanne Messer	541.778.6599 541.941.2924
Portland Public Schools (OR)	Amy Kohnstamm	503.913.3945
Richland School District (WA)	Rick Jansons	509.528.3488

Hank's resume is attached. Hank has been in private practice since 2011, specializing in leadership selection in public school districts in the Pacific Northwest. He has been instrumental in finding outstanding educational leaders at the Superintendent and Cabinet level since 2012. His success rate is very strong, in that 90% of all Oregon and Washington Superintendents and Deputy/Assistant Superintendents who have been placed as a result of a search that Hank has led are still leading their respective districts.

Prior to opening Human Capital Enterprises, Hank was a teacher, principal, and central office leader in Oregon, Washington, and California. He served as Executive Director of Human Resources for Canby School District and for Portland Public Schools in Oregon and held the same role in Bellingham School District in Washington before entering private practice. He also served on the governing board of the American Association of School Personnel Administrators, and was their Interim Executive Director for a period of time in early 2014.

Both HCE and HYA envision certain milestones for this work with the Eagle Point School Board, on a clear timeline that has been pre-approved by the members of the Board. The work of the search can be delineated as follows.

1. PLANNING

Hank works closely with the Board to establish parameters and a framework for the search. Hank will develop a strong communication plan with the Board that meets the needs of the Board collectively and individually.

2. POSTING AND ENGAGING.

Care is taken to post the position in the appropriate venues for the kind of search that the Board desires. Hank will also spend time in the Eagle Point area, getting to know the community by engaging with key stakeholders and conducting focus groups. Following this high-level engagement, Hank will present to the Board a draft “Ideal Profile” for the Board to consider.

3. RECRUITING

The ability to attract candidates who may not be actively searching for a leadership role is a key hallmark of the HCE approach. Hank’s direct email announcements are widely known by Washington and Oregon school leaders as well as nationwide – and they reach an audience of over 11,000 educational stakeholders across the country. Hank reaches out to talented individuals throughout the region who reflect the profile of the ideal Eagle Point superintendent candidate, in order to entice talented individuals who might not otherwise know about the vacancy in Eagle Point. Similarly, there are candidates who might know of the Eagle Point vacancy but may not recognize that it is an ideal opportunity for them to consider. Those are the very individuals Hank will identify and approach.

4. SELECTION

Hank will engage in multiple conversations with top prospects including a preliminary interview and preliminary reference check. Top candidates will be recommended to the Board in an Executive Session, at which time the Board will determine whom to invite for first-round interviews. Although Hank will articulate a rationale regarding each recommended and non-recommended candidate, the Board may decide to interview any candidates that it selects.

There are several options for the Board to consider in determining a selection process and timeline, and these will be provided – as well as advantages and disadvantages of each. Consistent throughout will be an extremely high level of communication and professionalism. Board Members as well as Candidates will feel a respectfulness and care that is the hallmark of HCE.

5. TRANSITION

Hank will guide the Board through the finalization process, which includes the public announcement and an optional but recommended, comprehensive background check.

6. FEE FOR SERVICE

Consultant Fee is \$24,800. This includes all management and coordination of the search and includes up to 10.5 days on site, which is typically an adequate amount of days onsite for a search in a school district the size of Eagle Point.

- Planning Session with Board
- Three Consultant Days of Focus Groups and Board and Community Interviews
- Ideal Profile Meeting with Board
- Slate Meeting
- First-Round Interviews
- Three Days of Second-Round Interviews followed by a morning Selection Meeting.
- Upon request, additional days on site available for expanded search work or Board coaching.

HCE recognizes the challenges of Oregon school budgets, and therefore recommends only the following additional items for the Board to carefully consider.

- a. Candidate travel reimbursement.
 - HCE recommends the District reimburse out of town candidates for travel to Eagle Point for in-person interviews.
- b. Consultant travel reimbursement.
 - To ease travel expenses for the school district, Hank is physically based on the west coast from November through April.
- c. Advertising.
 - i. Advertising is determined in conversation with the Board.
 - ii. Hank's listserv reaches over 11,000 individuals who are identified as education leaders or education stakeholders. A listserv blast is included at no extra charge.
 - iii. COSA is free to Oregon school districts who have an active membership.
WASA/WSSDA/WSPA in Washington state is recommended at reduced or no fee when posted directly by the District.
 - iv. National advertising packages are available through HYA.

- d. Comprehensive Background Check
 - HCE Engages with a third-party to conduct an optional comprehensive background check on selected finalist(s). Rates run between \$1100-1950 with an average of ten-day turnaround.

7. GUARANTEE

- a. The Superintendent appointed will not be presented to another Board as a candidate if it would result in the Superintendent leaving Eagle Point within three years of employment.
- b. If the Superintendent departs from the position during the first year under any circumstances or within two years if a majority of the Board by vote 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.

On behalf of Human Capital Enterprises and Hazard Young Attea and Associates, I thank you for your consideration.

*Hank Harris
President, Human Capital Enterprises
Senior Associate, Hazard Young Attea and Associates*

A Proposal for the Selection of a Superintendent

Presented To:



Eagle Point School District 9

Every Student. Every Class. Every Day

Submitted By:

Ray and Associates, Inc.

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Ray and Associates, Inc.
Leaders in Executive Searches

August 29, 2019

Eagle Point School District 9
ATTN: Mr. Dan Hodges, Board Chair
11 N Royal Avenue
Eagle Point, OR 97524

Dear Mr. Hodges and Members of the Board of Directors:

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 Oregon as we have completed successful Superintendent searches for Hood River County School District, Lake Oswego School District, Gresham-Barlow School District, Salem-Keizer Public Schools, Eugene School District 4J and Medford School District 549C, Oregon. In the Western region we have conducted Superintendent searches for Everett Public Schools, Granite Falls School District, Lake Washington School District, Snoqualmie Valley School District, Seattle Public Schools, Mercer Island School District, Bellevue School District, Northshore School District, Kent School District and Federal Way Public Schools, Washington; Colorado School for the Deaf and the Blind, Colorado Springs School District 11, Sheridan School District No. 2, Boulder Valley School District, Douglas County School District, Jeffco Public Schools and Eagle County Schools, Colorado; Clark County School District, Nye County School District and Lander County School District, Nevada; Blaine County School District, Idaho; Palos Verdes Peninsula Unified School District, Poway Unified School District, San Ysidro School District, Santa Clara County Office of Education, Albany USD, Berkeley USD, Pasadena USD, Sacramento City USD, East Side Union HS District and Emery USD, California; Missoula County Public Schools, Montana; Los Alamos Public Schools, Albuquerque Public Schools, Santa Fe Public Schools and Roswell Independent School District, New Mexico; Paradise Valley Unified School District, Deer Valley Unified School District, Roosevelt Elementary School District, Gilbert Public Schools, Camelback Desert Sands, Tempe Union High School District and Cartwright Elementary School District, Arizona; and Hawaii School of Deaf and Blind, Hawaii.

Nationally we have assisted Waterbury Public Schools, Greenwich Public Schools, Bridgeport Public Schools, Hartford City Public Schools and the Consolidated School District of New Britain, Connecticut; Wyandanch Union Free School District and Amityville Union Free School District, New York; Baltimore County Public Schools, Anne Arundel County Public Schools, Howard County Public School System,

Wicomico County Public Schools and Prince George's County Public Schools, Maryland; Woodland Hills School District, Lewisburg Area School District, Wissahickon School District, Millville School District, Montgomery County Intermediate Unit 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; Dover School District, New Hampshire; Tangipahoa Parish School System, Louisiana; Lynchburg City Schools, Montgomery County Public Schools, Mecklenburg County Schools, Bedford County Schools, Newport News Public Schools, Hampton City Schools, Prince William County Public Schools and Williamsburg-James City Schools, Virginia; Savannah-Chatham County Public School System, Georgia; Maury County Public Schools, Knox County Schools, Oak Ridge Schools and Sumner County Schools, Tennessee; Pulaski County Special School District, Rogers Public Schools, Cotter Public Schools, Mountain Home Public Schools and Fayetteville Public Schools, Arkansas; The School District of Palm Beach County, Florida State University Schools, Brevard Public Schools and Collier County Public Schools, Florida; 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; Cleveland Heights-University Heights City School District, Shaker Heights City Schools, Cincinnati Public Schools and Lorain City Schools, Ohio; Omaha Public Schools and Westside Community Schools, Nebraska; Lakeville Area School District, Minnesota; Dickinson Public Schools, Williston Public School District 1 and Fargo Public Schools, North Dakota; Vermillion School District, South Dakota; Detroit Public Schools Community District, Ecorse Public Schools, Benton Harbor Area Schools and Ann Arbor Public Schools, Michigan; Geary County Schools USD 475, Shawnee Mission School District, Lawrence Public Schools and Kansas City Kansas Public Schools, Kansas; Joplin Schools and Kansas City Public Schools, Missouri; Butler School District 53, Rock Island-Milan School District #41, Hazel Crest School District 152½, Glenbrook North and Glenbrook South High Schools, Joliet School District and Township School District #113, Illinois in their educational leadership searches.

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

We are currently assisting Bloomfield Hills Schools, Michigan; Indian Prairie School District 204 and Orland School District 135, Illinois; Marion County Public Schools and Hillsborough County Public Schools, Florida; Hawaii State Department of Education, Hawaii; and 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 (40) 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 over one hundred sixty (160) 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 "R.M. Ray". The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Ryan M. Ray
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.*



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 Eagle Point School District 9 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

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 a National Executive Director, eight (8) Regional Search Directors and over one hundred sixty (160) 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 (40) 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 Oregon as we have completed successful Superintendent searches for Hood River County School District, Lake Oswego School District, Gresham-Barlow School District, Salem-Keizer Public Schools, Eugene School District 4J and Medford School District 549C, Oregon. In the Western region we have conducted Superintendent searches for Everett Public Schools, Granite Falls School District, Lake Washington School District, Snoqualmie Valley School District, Seattle Public Schools, Mercer Island School District, Bellevue School District, Northshore School District, Kent School District and Federal Way Public Schools, Washington; Colorado School for the Deaf and the Blind, Colorado Springs School District 11, Sheridan School District No. 2, Boulder Valley School District, Douglas County School District, Jeffco Public Schools and Eagle County Schools, Colorado; Clark County School District, Nye County School District and Lander County School District, Nevada; Blaine County School District, Idaho; Palos Verdes Peninsula Unified School District, Poway Unified School District, San Ysidro School District, Santa Clara County Office of Education, Albany USD, Berkeley USD, Pasadena USD, Sacramento City USD, East Side Union HS District and Emery USD, California; Missoula County Public Schools, Montana; Los Alamos Public Schools, Albuquerque Public Schools, Santa Fe Public Schools and Roswell Independent School District, New Mexico; Paradise Valley Unified School District, Deer Valley Unified School District, Roosevelt Elementary School District, Gilbert Public Schools, Camelback Desert Sands, Tempe Union High School District and Cartwright Elementary School District, Arizona; and Hawaii School of Deaf and Blind, Hawaii. 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 Eagle Point School District 9. 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 Eagle Point School District 9. In addition, we have professional contacts throughout Oregon, the western 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. Ryan M. Ray, President

Cedar Rapids, IA

Ryan is President of Ray and Associates, Inc. He supervises and oversees all searches conducted by the firm and will directly interact with the Eagle Point School District 9 and any committee that may be established on all details of this search. He has an earned Master's degree from Lindenwood University in St. Louis and a Bachelor's degree from the University of Missouri in Columbia, Missouri.

Dr. James Hager

Regional Search Director

Renton, WA

Jim serves our firm as a Regional Search Director and will monitor and direct search team efforts as well as recruiting and screening candidates. Dr. Hager received his Bachelor of Science Degree in Science from St. Benedict's College in Atchison, Kansas; a Master of Science Degree in Educational Administration from Kansas State University, Manhattan, Kansas; and a Doctor of Philosophy Degree in Educational Administration and Curriculum from the University of Iowa, Iowa City, Iowa. Jim has served in the education for over 30+ years.

Mr. Robert Neu

Regional Search Associate

Enumclaw, WA

Rob serves our firm as a Regional Search Associate and will monitor and direct search team efforts as well as recruiting and screening candidates. Mr. Neu received a Bachelor of Science degree in Business Education from Eastern Michigan University; a Master of Arts degree in Secondary School Administration from Central Michigan University and his Educational Specialist degree from Oakland University in Michigan. Rob has 30+ years in the education field having served as a teacher, Assistant Principal, Principal, Director of Secondary Education and Superintendent.

SUMMARY OF PROJECT ASSOCIATES

Dr. Roy Brooks
Little Rock, AR

Mr. Dale Caldwell
New Brunswick, NJ

Mr. Rick Mills
Chicago, IL

Dr. Gloria Davis
Chicago, IL

Dr. Darlene Schottle
Big Fork, MT

Dr. James Davis
Plano, TX

Mr. Ricardo Medina
Bridgeport, MI

Dr. Brenda Dietrich
Topeka, KS

Dr. Mary Fasbender
St. Charles, IL

Mr. Dale Monroe
Marion, IA

Mr. Don Long
Hendersonville, TN

Mr. Michael Collins
Columbus, OH

Dr. Paige Fenton-Hughes
Douglas, WY

Ms. Sandi Gero
Rock Hill, SC

Dr. Carl Davis
Powder Springs, GA

Mr. Robert Alfaro
Hutto, TX

Dr. Ann Schultz
Westminster, CO

Dr. Bob Hammon
Sycamore, IL

Mr. Alvin Johnson
Sandy Springs, GA

Dr. Michael Rush
Lakewood, NJ

Dr. Bob Mata
Cathedral City, CA

Dr. Tom Williams
Scottsdale, AZ

Dr. Lane Plugge
Council Bluffs, IA

Dr. Mary Ronan
Cincinnati, OH

Dr. Richard Christie
Council Bluffs, IA

Dr. Karen Stinson
Platteville, WI

Other associates throughout the country will be actively recruiting, screening, and investigating finalist candidates.

SECTION I

CONSULTANT SERVICES PROVIDED FOR EAGLE POINT SCHOOL DISTRICT 9 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 Eagle Point School District 9.
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 Eagle Point School District 9 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 Skype, 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'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 Confederation of Oregon School Administrators and Oregon 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 Eagle Point School District 9 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 Eagle Point School District 9.

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.

EAGLE POINT SCHOOL DISTRICT 9

SUPERINTENDENT SEARCH *SUGGESTED* PROCESS AND TIMELINE

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

DATE

<p>Stage 1 Board Input & Preparation</p>	<p>_____ Consultant planning meeting with the Board and individual Board member interviews. <i>(Time: TBD)</i> (option to conduct via Skype, 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>
<p>Stage 2 Profile Development & Process</p>	<p>_____ Online survey link, for input on developing the profile, available on District website from _____ to _____.</p> <p>_____ Meetings with constituent and stakeholder group representatives.</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>_____ Board to finalize Superintendent profile for the promotional flyer and online application form. <i>(Time: TBD)</i> (option to conduct via Skype, conference call or gotomeetings.com)</p>
<p>Stage 3 Recruiting & Screening</p>	<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>
<p>Stage 4 Candidate Presentation</p>	<p>_____ 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. <i>(Time: TBD)</i></p> <p>_____ Interview candidates (1st round).</p> <p>_____ Meeting with consultant following the last interview. <i>(Time: TBD)</i></p>
<p>Stage 5 Selection of Finalist & Future Planning</p>	<p>_____ Interview finalist candidates (2nd round). <i>(Optional)</i></p> <p>_____ Final meeting with consultant following the last interview. <i>(Time: TBD)</i> (option to conduct via Skype, 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 160 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 Eagle Point School District 9 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 sixteen thousand five hundred dollars (\$16,500.00). 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 Skype, 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 1st round candidate interviews via Skype 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: EAGLE POINT SCHOOL DISTRICT 9

Ray and Associates, Inc. will spend as much time as needed to conduct a successful search for Eagle Point School District 9. 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	1,500.00
Ground transportation (billed at \$0.58 per mile)	200.00
Hotel (if needed for stakeholder meetings)	400.00
Meals	150.00
** Travel Subtotal.....	2,250.00

****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:2,750.00
Ray and Associates, Inc. Base Fee16,500.00

***ESTIMATED SEARCH COST \$19,250.00**

***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. Eagle Point School District 9 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 how extensive the need as determined by Eagle Point School District 9. 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.

SECTION IV

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 Skype.

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 Eagle Point School District 9. If Eagle Point School District 9 or Ray and Associates, Inc. terminate this agreement, Eagle Point School District 9 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
Everett Public Schools Jim Hager worked this search	Everett, WA	Caroline Mason	Board Member	Cell: 425-238-7308 caroline.mason@everettsd.org
Lake Oswego School District Jim Hager worked this search	Lake Oswego, OR	Liz Hartman	Board Member	Cell: 503-697-7727 liz.hartman@loswego.k12.or.us
Lake Washington School District Jim Hager worked this search	Lake Washington, WA	Siri Bliesner	Board President	District Number: 425-936-1257 sbliesner@lwsd.org
Westside Community Schools	Omaha, NE	Adam Yale	Board Member	Cell: 402-672-2294 yale.adam@westside66.net
Woodland Hills School District	North Braddock, PA	Jamie Glasser	Board President	Cell: 412-874-0161 glasja@whsd.net
Tangipahoa Parish School System	Amite, LA	Therese Domiano	Former Board President	Cell: 985-974-2955
Lawrence Public Schools	Lawrence, KS	Shannon Kimball	Former Board President	Cell: 785-840-7722 skimball@usd497.org
Pittsburg Community Schools USD 250	Pittsburg, KS	Marlene Willis	Former Board President	Cell: 602-404-8835 mwillis@usd250.org

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

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.

A Proposal Prepared for

***Eagle Point
School District 9
Eagle Point, Oregon***

for

*The Search and Selection of a
Superintendent of Schools*

submitted by

MCPHERSON *MJ* JACOBSON, LLC

EXECUTIVE RECRUITMENT & DEVELOPMENT



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Omaha, Nebraska 68144
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Email: mail@macnjake.com
Website: www.macnjake.com



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FAX: 402-991-7168 ♦ EMAIL: MAIL@MACNJAKE.COM ♦ WEBSITE: WWW.MACNJAKE.COM

September 4, 2019

Board of Directors
Eagle Point School District 9
11 N. Royal Ave
Eagle Point, Oregon 97524

Thank you for the opportunity to respond to your RFP. The enclosed proposal describes the professional services McPherson & Jacobson, L.L.C. will provide Eagle Point School District 9 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 stakeholder groups you identify, will implement a systematic, comprehensive process culminating in the hiring of the most qualified candidate for your district.

With over 100 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

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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09/19

The McPherson & Jacobson Difference

“It’s About the Kids”

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

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

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

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

Leading National Search Firm

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 725 superintendents** and other officials in public and non-profit organizations across the United States. **McPherson & Jacobson is one of the leading national superintendent search firms.**

Nationwide Network of Experienced Consultants

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

Sustainability in Leadership

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

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

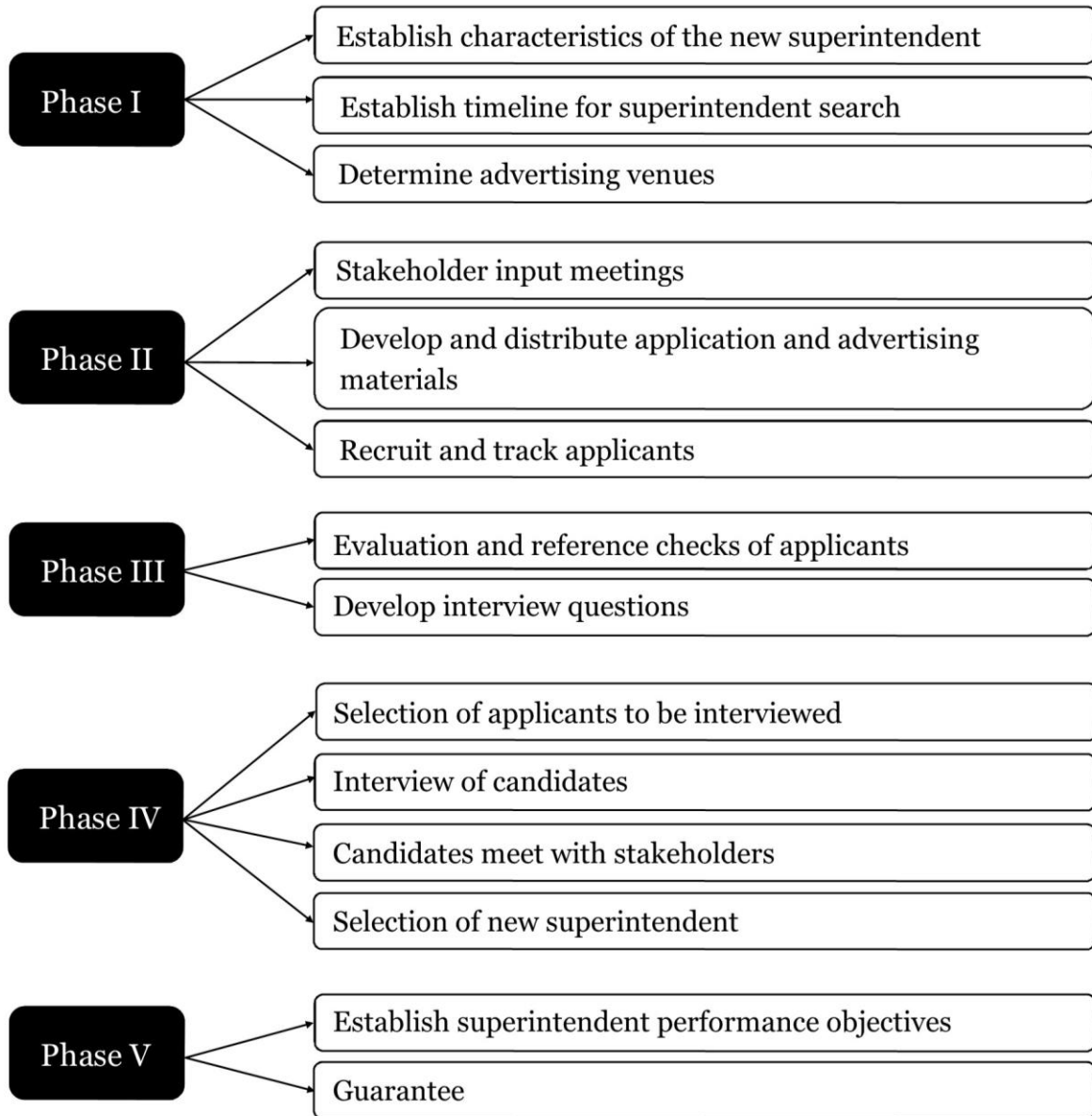
Executive Summary

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

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

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

Five Phases of a Superintendent Search



Phase I

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

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

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

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

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

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

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

✓ **Identify appropriate stakeholder groups.**

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

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

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

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

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

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

Phase II

In Phase II McPherson & Jacobson's consultants will:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

- ✓ **Confidentiality of Applicants**

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

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

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

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

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

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

Phase III

In Phase III McPherson & Jacobson's consultants will:

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

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

✓ **Conduct reference checks.**

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

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

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

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

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

Priscilla Cox, Elk Grove Unified School District, CA

"Promptness, excellent candidate selection, timely service and professional manner" (what board member liked about the service)

Kevin West, Arkansas Arts Academy, Rogers, AR

Phase IV

In Phase IV McPherson & Jacobson's consultants will:

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

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

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

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

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

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

- ✓ **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

In Phase V McPherson & Jacobson's consultants will:

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

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

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

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

✓ **Provide a guarantee.**

If the board chooses to use our complete service, we will guarantee our process 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.

"I am sure our Board would look to McPherson & Jacobson again the next time we are looking for a superintendent."

John Rice, Twin River Public Schools, Genoa, NE

Timeline

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

Search sequence:

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

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

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

- After the closing date
 - All the completed applicant files are forwarded to the consultants
 - The consultants begin the review and pre-interview process

- Approximately two to four weeks after the closing date
 - Consultants provide information to the board on all applicants who completed the process
 - Consultants present summary profiles 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
 - 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

Consultants for Search

Julian Diaz

1481 Hammon Avenue

Oroville, CA 95966

Email: j_diaz@macnjake.com

Phone: 530-680-3880

Educational Background

M.S.A.	2013	National University	Administration
Clear Admin. Service Cred. II	1995	California State University-Sacramento	Ed. Admin.
Prelim. Admin. Service Cred. I	1990	California State University-Sacramento	Ed. Admin.
Multiple Subject Credential-Cross Cultural Spanish	1984	California State University-Chico	
B.A.	1983	California State University-Chico	Liberal Studies

Professional Experience

Dates		Title	District	Location	Enrollment
2017	to Present	Consultant	McPherson & Jacobson, L.L.C.	Omaha, NE	
2008	to 2016	Superintendent	Thermalito Union School District	Oroville, CA	1,400
2006	to 2009	Principal/Acting Superintendent	Thermalito Union School District	Oroville, CA	500
2006	to 2006	Middle School Principal	Oroville City Elem. School District	Oroville, CA	300
2001	to 2006	Elementary Principal	Oroville City Elementary School District	Oroville, CA	300
1996	to 2006	Elementary Principal	Oroville City Elem. School District	Oroville, CA	300
1991	to 1996	Elementary Principal	Eastside Elem. School and District Independent Study	Lancaster, CA	700
1989	to 1996	Bilingual Coordinator	Oroville City Elementary School District	Oroville, CA	300

Professional Organization Memberships

Name of Organization	Dates	Offices Held
Butte County Administrator Association	2004 to 2007	President
Quien es Quien in U.S. Commerce	1993 to 1994	Honored Member
Association of California School Administrators		Member
Association for Supervision and Curriculum Development		Member
California Association of Bilingual Educators		Member

Community/Service/Fraternal Organizations

Name of Organization	Dates	Offices Held
State ACSA Council: Equity Achievement and Diversity Council	2007 to 2010	
Oroville Orca Swim Association	1993 to 1999	President ('93-'95)
Thermalito Little League	1993 to 1995	Asst. Coach
Woodland J.U.S.D.	1986 to 1988	Coach JV/Varsity and President of ALMA
Los Baños U.S.D.	1985 to 1986	Coach

References for Julian Diaz

Mr. Joe Gibson, Board President
Anderson Union High School District
Anderson, CA
jgibson@sfi-insurance.com

Mrs. Cindy Trotter-Hogue, Board Member
Anderson Union High School District
Anderson, CA
chogue@hvusd.net

Mr. Ron Brown, Board Member
Anderson Union High School District
Anderson, CA,
psheltie@att.net

Teri L. Vigil
P.O. Box 669
McArthur, CA 96056
Email: t_vigil@macnjake.com
Phone: 530-227-0668

Educational Background

	1986	Cal Poly San Luis Obispo	Animal Science
A. A.	1984	Fresno City College	Liberal Arts Transfer

Professional Experience

	Dates	Title	District	Location
	2017 to Present	Network Facilitator	CSBA Professional Learning	
	2014 to Present	Consultant	McPherson & Jacobson, L.L.C.	Omaha, NE
	2012 to Present	Executive Consultant	Safe Schools Alliance	
	2001 to Present	President	Fall River Joint Unified Board	
	1986 to 1988	Vet Assistant	Dr. Leroy Krum	

Professional Organization Memberships

Name of Organization	Dates	Offices Held
Safe School Alliance	2012 to Present	
CSBA	2016 to Present	Board Member
Federal Relations Network	2008 to Present	
Negotiating team member CSEA and FRTA	2003 to Present	Member
Fall River Joint Unified School District, Representing Shasta County	2001 to Present	Board Trustee
Fall River Elementary	1995 to 2001	Council Member
Intermountain Preschool Coop	1991 to 1998	Board Member

References for Teri Vigil

Claire Schumacher, Board Member
Fort Sage Unified School District
Herlong, CA
Phone: (530) 827-2129

Julie Olsen, Board President
Saugus Union School District
Santa Clarita, CA
jolsen@saugusud.org

Mr. Joe Gibson, Board President
Anderson Union High School District
Anderson, CA
jgibson@sfi-insurance.com

Selected References

Bend-La Pine Schools

520 NW Wall St.

Bend OR 97701

School Phone: 541-355-1000

School District Contact: Andrea Wilson

Board Contact: Nori Juba/Cheri Helt /541-317-9777, 541-788-7872/541-460-3845

Search Year: 2014/15

Enrollment: 17,300

North Bend School District

1913 Meade St.

North Bend OR 97459

School Phone: 541-756-2521

School District Contact: Cheri Schreiber

Board Contact: Julianna Seldon, 541-297-7766

Search Year: 2018/19

Enrollment: 2,300

Reynolds School District

1204 NE 201st Ave.

Fairview OR 97024

School Phone: 503-661-7200

School District Contact: Connie Philibert

Board Contact: Joe Teeny, 503-680-9632

Search Year: 2017/18

Enrollment: 11,200

Springfield Public Schools

640 A Street

Springfield OR 97477

School Phone: 541-747-3331

School District Contact: Judy Bowden

Board Contact: Zach Bessett, 541-914-8959, 541-914-8959

Search Year: 2018/19

Enrollment: 10,700

Responsibilities of Eagle Point School District 9 and McPherson & Jacobson, L.L.C.

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

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

Eagle Point School District 9

Event	School District's Tasks
1 st Board Meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Provides consultant with the necessary information to create the brochure; the name of the Point of Contact; and the board member list <input type="checkbox"/> Reviews the brochure
Community meetings are scheduled	<ul style="list-style-type: none"> <input type="checkbox"/> Names and addresses are sent to Home Office for community member stakeholder meeting invitations <input type="checkbox"/> Notifies internal stakeholders of times and locations for stakeholder meetings <input type="checkbox"/> Posts dates, times and locations of meetings and public forum(s) and encourages stakeholder attendance <input type="checkbox"/> Publishes link to online stakeholder input survey
3 rd board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Board decides if they wish to conduct semi-finalist interviews <input type="checkbox"/> Assist with lodging arrangements and welcome gifts <input type="checkbox"/> Arrange for spouse/significant other tour <input type="checkbox"/> Arrange logistics for stakeholder focus groups
Semi-finalist Interviews	<ul style="list-style-type: none"> <input type="checkbox"/> The board interviews each semi-finalist <input type="checkbox"/> The board determines the finalists to be interviewed
Interviews	<ul style="list-style-type: none"> <input type="checkbox"/> One candidate per day <input type="checkbox"/> Board member greets each candidate upon arrival to district <input type="checkbox"/> Coordinates candidate's meeting with stakeholder focus groups and retrieval of input forms <input type="checkbox"/> Informal interview-social setting <input type="checkbox"/> Formal interview <input type="checkbox"/> Spouse/significant other's visitation is coordinated
Meeting to Select Finalists/ Finalist selected and accepted	<ul style="list-style-type: none"> <input type="checkbox"/> Board members meet and discuss each candidate individually <input type="checkbox"/> Individually rank order candidates <input type="checkbox"/> Read input forms submitted by stakeholder focus groups <input type="checkbox"/> Select minimum of #1 and #2 candidates <input type="checkbox"/> Contact consultant with selection results <input type="checkbox"/> Send interview forms and files to the Home Office <input type="checkbox"/> Board completes an evaluation of the search service provided by McPherson & Jacobson
Phase V	<ul style="list-style-type: none"> <input type="checkbox"/> Superintendent creates plan with target objectives and timelines <input type="checkbox"/> Board adopts plan <input type="checkbox"/> Send copy of plan to Home Office

Investment

The investment for conducting the superintendent search is \$9,900 for Phases I-V.

The total not to exceed amount including expenses is \$16,400.

Included in the expenses is

- 30 days of advertising on AASA
- 30 days of advertising on TopSchoolJobs
- 1 day of stakeholder meetings
- Consultant travel expenses for four (4) trips to the district
- One online stakeholder input survey (in English)
- Video interviews for five (5) candidates
- Criminal/financial/credential verification background check for the final candidate
- Office expenses

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.

Additional Services:

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

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

Price Breakdown for Search Activities

Phase	Description of Services	Fee	Expenses
I	Meet with board to start search process. Start development of application materials. Initiate advertising.	\$1,900	\$1,950
II	Conduct stakeholder input meetings. Begin candidate recruitment.	\$2,300	\$2,100
III	Continue candidate recruitment. Conduct reference checks on applicants.	\$2,300	\$300
IV	Meet with the board to review applicants and identify finalists to be interviewed. Assist board with interview questions and schedule. Coordinate candidate visits to the district.	\$1,900	\$1,200
V	Meet with the board to determine the superintendent performance objectives.	\$1,500	\$950
Totals		\$9,900	\$6,500
	Total*	\$16,400	

*Fees and/or expenses will increase if

- the board chooses advertising media over \$ 1,000;
- the board requests more than one (1) day 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.

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.

Transparency—The McPherson & Jacobson Difference

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

An open process

“Any government entity wanting to conduct a model search for a high-profile executive would be well-served by the studying the hiring of a new superintendent by the Sioux City Community School District.”...

“As interested, affected observers and taxpayers, residents of the district should appreciate the openness with which the school system approached the stretch run of the search.

The public was provided with specific details about the last stages of the process, all the way through the final decision, which was announced Friday.”...

“When government does not act in proper open fashion, we criticize. Conversely, government deserves credit when it goes the extra mile to provide the public with information it wants and to which it is entitled.

Instead of cloaking its careful, thorough search for a superintendent in dark secrecy as a decision neared, the Sioux City school district opened it to the sunshine of public discourse. As a result, residents of Sioux City can feel comfortable with the choice...*and* with the process by which he was selected.”

Taken in part from the *Sioux City Journal*, April 15, 2008.

www.Siouxcityjournal.com

Open search process, solid choice

“....

“A lot has changed in the Fayette County Public Schools in the eight years since the school board smuggled in a candidate for superintendent under an umbrella to hide his identity from the public.

“The search that just culminated with the hiring of Tom Shelton was as commendable for its openness as that earlier search was memorable for its silliness — and its unfortunate outcome: the winner resigned after just eight months.

“Process does matter. It matters a lot when selecting the leader of a public institution. So, before moving on to the next chapter, the board deserves a shout out for the way this search was managed.

“... ”

“Having been chosen through an open process in which stakeholders had the chance to participate gives him a leg up on gaining that trust and respect. We wish him well.”

**Taken in part from *Open search process, solid choice* | Editorial | Kentucky.com
<http://www.kentucky.com/2011/06/15/1775505/open-search-process-solid-choice.html>**

Wake names three superintendent finalists

“Veteran career educators from North Carolina, Virginia, and Texas are the three finalists vying to replace Tony Tata as superintendent of Wake County school system.

“... ”

“The three will meet with the public at a forum scheduled for Tuesday. The board will interview them the next day with the final vote possibly coming during the June 4 meeting....

“.... ”

“Not since 1995 had the school board released the names of the finalists for superintendent. McPherson & Jacobson, the Nebraska-based search firm hired by the board, said that naming the finalists and having them meet with the public would make the process more transparent and lead to greater public support when the board makes its choice.

“The school board reviewed 23 applications, ultimately choosing semi-finalists who were on a short list recommended by the search firm. The board interviewed the four semi-finalists last week.

“... ”

**Taken in part from
www.newsobserver.com/2013/05/22/2908354/wake-names-superintendent-finalists.html
May 22, 2013**

Superintendent hiring process involves significant cross-section of G.I. [Grand Island]

“The Grand Island school board, and in fact the entire community, is in the midst of an extremely important process. That is selecting a new school superintendent.

The school board has set up a very open process in which each of the four finalists are coming to Grand Island this week for a full day, visiting with teachers, school officials, community members, business people, the media and being interviewed by the school board.

While it certainly makes for a full week, it is a good process that allows a variety of community members an opportunity to meet the finalists and give their input on the selection.

...

...The board has also taken the important step of opening the process to the community, rather than just keeping it among board members.

It’s important that the school board receive input from as much of the community as possible. Ultimately, it will be the board’s decision on whom to hire, but involving the community in the process was a wise move.

The timing of the selection of the finalists and the interviews also have been good. The Grand Island board is going through the process early enough in the school year so that whomever they select won’t be leaving their current school district in a lurch in finding a new superintendent.

...”

**Taken in part from *The Grand Island Independent*, December 1, 2010.
Grand Island, NE**

Opinion

“We ... want to salute the five school board members for the open and inclusive process they followed in narrowing the field of candidates and reaching out to the North Thurston community to come to the best choice [new superintendent] for the district and its 13,500 students.”...

“It was an excellent, open and transparent superintendent selection process and the board members deserve credit not only for the process but for listening to their community.”

Taken in part from *The Olympian*, April 8, 2009

An open superintendent search process is good for the community

“Now that the search is on for a candidate [superintendent], I believe the entire process could not be in better hands [McPherson & Jacobson]...When the CCEA [Culpeper County Education Association] executive board members met with them [McPherson & Jacobson], my first impression was one of complete relief.”...

“They [McPherson & Jacobson] explained that before any candidates come before the School Board, they will be vetted with deep background checks and will be matched up with the profile for the CCPS [Culpeper County Public Schools] position. Each candidate will not only be thoroughly interviewed by the School Board, but also will have a chance to meet with stakeholders before the final decision is made.”...

“...I commend the board for its decision to contract with McPherson and Jacobson to handle our superintendent search.

This is not just a corporate head-hunting firm seeking a field of generic candidates.”...

“The fact that the process had complete transparency is good for all stakeholders.”

Taken in part from Walker, Jeff, 2009. *Culpeper Star Exponent*, February 4

Conducting a super search

“We don’t know who will ultimately be selected to lead the South Bend Community School Corp. into the future, but we—and indeed the public—know plenty about the process leading up to the hiring of the next superintendent.

“...So far, the search has been transparent. It has been inclusive, not merely accepting public input, but firmly demanding it.

“..."

“From the start, members of the public were included in the search. A citizen advisory committee was formed and charged with soliciting input from community members about the challenges and strengths of the district, and the qualities the next super should possess.

“..."

“The search also included 29 community forums, in various locations across the community, for the public in general, as well as such specific groups as teachers, not-for-profits and government boards.

“In short, the process of finding South Bend’s schools chief has been a model for how such a search ought to be conducted...”

“..."

Taken in part from
southbendtribune.com/news/opinion/sbt-20111103sbtmicha-07-04-20111103,0,58885628.story

Board of Education Scores New Superintendent

“The process to find the new super [superintendent for the Marshalltown Community School District] was done in collaborated fashion over three months which included hiring the search firm McPherson & Jacobson to collect applications and put them through vigorous interviews in order to narrow the field to five finalists. In the home stretch, several focus groups (represented by community members, parents, teaching staff, students, businesses, central office staff, and building administrators) interviewed the five candidates in five days before the board rendered its choice Saturday afternoon....

“...remarked Macmillan [Board President Adrienne Macmillan] ‘The expertise and professionalism that McPherson & Jacobson brought into this process was phenomenal. They really made themselves an extension of our educational community and worked with us in a very detailed level to help work through our selection criteria. It really made our job very easy in the fact that we got 18 total candidates at this time of the year and with the vast majority having solid superintendent experience, it is a credit to their firm.’

“In all, the Board was pleased how the community and focus groups rallied around choosing the new leader, exhibiting a team effort, as well as spirit. Macmillan concluded. ‘It truly demonstrates that whole adage about how it takes a village to raise a child, and this was it.’”

Taken in part from Lawson, Tammy. *The Marshall County Sun*, May 15, 2008.

Fayette school board might announce superintendent finalists Tuesday

“The search for a new Fayette County Public Schools superintendent is entering its final, crucial phase, and the names of finalists for the post could be revealed Tuesday night.

“...

“...McPherson & Jacobson, the schools’ superintendent search firm, plans to notify probably finalists to stand by for calls Tuesday night, so notifying those selected could take only a few minutes. That would allow the board to make the names public soon after members make their decisions.

“....

“Board members plan to bring each finalist to Lexington for tours of the school district; interviews with the board, meetings with education, civic groups and the media; and a session with the public. One finalist would visit each day of that process.

“....”

**Taken in part from
<http://www.kentucky.com/2011/05/31/1758135/fayette-school-board-might-announce.html>
June 2, 2011**

Public or Secret: Districts Hire Top Leaders Differently

“Davenport, Iowa—Local school boards have been put to the test: pick a superintendent in the light of day or do it behind closed doors. When hiring a new leader in Iowa, it’s ultimately school board members who decide whether to involve the community that elected them.”...

“In the North Scott School District, board members decided to ... conduct their search in secret. Next door, the Bettendorf school board opted for another route: transparency. ... In Bettendorf’s case, the board made its final selection with input from an informed public that knew the candidates and their backgrounds.”...

“ ‘One of the arguments is that no one will apply if we do it publicly,’ said Charles Davis, executive director of the National Freedom of Information Coalition. ‘I guess that was refuted by the fact that you did have candidates for both jobs. There is not a (bit) of evidence out there supporting that thesis.’

From the beginning, Ray and Associates, the search firm hired by North Scott... promised applicants confidentiality, some finalists said. McPherson & Jacobson, a search firm hired by Bettendorf...told candidates the process would become public once the board selected finalists. Despite their different approaches, both attracted dozens of candidates from across the country. Both searches, members in Bettendorf and North Scott said, ended in the hiring of a qualified candidate.

Those who favor more open searches say the promise of confidentiality doesn’t dissuade a majority of applicants. Instead, it allows parents and other residents an opportunity to take part in the selection process, they said. ‘The people in Bettendorf know whether or not the applicant pool was diverse,’ Davis said. ‘They know whether the applicant pool was filled with experienced or inexperienced candidates. They know whether an insider candidate was rejected for an outsider candidate. They can compare one person’s resume against another. In North Scott, we don’t know anything, and we never will. There is certainly something that gets lost in that.’ ”...

“...The board [Bettendorf] decided early in the process after consulting with McPherson & Jacobson to keep the process open, something the search firm supported, said Wayne Rand, a search consultant for McPherson & Jacobson. To accommodate the board members’ decision, the district held public forums for each finalist so residents who wanted to could attend.

The board wanted to send a clear message that ‘the stakeholders’ input was valued,’ said Judy Miller, human resources director for Bettendorf. ‘There is no reason to keep that information from the public. They are interested in knowing who we are looking at and why.’

Rand said his experience in Bettendorf isn’t unique. Instead, every school board he’s dealt with during superintendent searches in Iowa has kept the process open for the public. And, each time, his search firm was able to land a large pool of qualified candidates... Taxpayers are interested in knowing because of the money being spent. If you exclude people, it’s natural that they feel left out, and they want to be involved in something like this.

Taken in part from *The Quad City Times*, March 9, 2009

Editorial

“Being involved in the search process for the new superintendent for Culpeper County Public Schools puts me a position that I do not mind being in. It is not a position of power, but I am involved, as are the other employees of CCPS and the community.”...

“...McPherson and Jacobson’s representatives...began the process of finding out what the School Board and other stakeholders were looking for, finding and vetting the potential candidates and presenting the narrowed field to the board.”...

“During this process, to my knowledge, the Culpeper County School Board has followed the recommendations of McPherson and Jacobson very closely. I believe they did this out of a sense of the importance of the situation and a respect for the professionals they charged with carrying out the task of helping match up a superintendent with our school system.”...

“...This executive search firm has either completed or is in the process of approximately 40 searches in 11 states for superintendent and other top administrators.”...

“Remember a school superintendent is not an elected official; he or she serves at the will of a School Board. The Culpeper County School Board has involved various segments of the school division and the public in the process. Veteran teachers who have been in Culpeper long enough to have worked under more than one superintendent have said the current process is the most open they have seen. By the end of this week, many individuals will have had a chance to see and hear and interact with the five candidates. Their input will be looked at. But, ultimately, the decision of whom to hire rests solely on the shoulders of the members of the elected School Board. That is one of the basic tasks of a School Board.”...

“Don’t we owe it to the 8,317 individuals under their [the new superintendent] leadership the opportunity for the process to find the right person for the job? And shouldn’t the manner in which we find the new superintendent be open and honest and without premature judgment?”

Taken in part from Walker, Jeff, 2009. *Culpeper Star Exponent*, April 1

Wake wise to announce superintendent final

“The Wake County school board is looking for a new superintendent of schools. Whether it will make the right choice remains to be seen, but it bodes well that it’s making the choice right away.

“The board, following the advice of its search firm, McPherson & Jacobson, has agreed to publicly identify its two or three finalists for the job of leading the state’s largest school district. The final candidates won’t only be named, they’ll come to Wake County and meet with the public.

“What a refreshing and sensible change from the secrecy that has surrounded the selection of new superintendents.....

“....”

**Taken in part from
www.newsobserver.com/2013/05/13/2890369/wake-wise-to-announce-superintendent.html
May 13, 2013**

Superintendent—District hires firm to assist in search; student provide input through student interview panel

“... The Board of Education...chose to hire the executive recruiting and development service, McPherson and Jacobson, to find Westside’s next leader.

“ ‘The board, in an open meeting, defined what we saw as our key objectives—what are the criterial? What are the qualities we would like to see in our next superintendent?’ said Scott Hazelrigg, one of the directors on the Board of Education...

“McPherson and Jacobson used the criteria the board established and the Stakeholders input report to select certain individuals to encourage applying.

....

“From Jan 16-20, Westside hosted the five finalists of the superintendent search for a series of interviews. Each day, a different candidate was welcomed into the Westside community by a coffee with school board members. The candidates then went on to participate in interviews with students, community members, teachers, administrators and the Board of Education.

...

“Though the board will ultimately make the decision about who the next superintendent will be, students received the opportunity to be involved in the process.

“ ‘One of the things we liked about the consultant was that they historically engaged a student group in the process,’ Hazelrigg said.

“Every morning a small group of juniors and seniors gathered in the conference room to meet the candidates....

“The questions the student panel asked included, ‘Why/how do you feel the input from the students is necessary when making choices?’ and ‘How do you make sure all students’ needs are met with so much diversity?’

“Junior Maddie Ryan led the student panel. Ryan prepared for the interviews by compiling questions suggested by the search firm in addition to those students requested, and doing preliminary research on the candidates.

“ ‘I think that it’s a really great opportunity that they are asking students, and I hope that whoever the superintendent is will continue to have student involvement,’ Ryan said.

“During the interviews, all students were engaged by asking candid questions and diligently taking notes.

“ ‘Everyone is pretty engaged; they are asking intelligent, thoughtful questions,’ Ryan said.

“...Other focus groups include teachers, key community members and members of the Westside Foundation.

“The student interviews allowed the board not only to get insight into what the students thought of the candidates, but also provided the candidates with an opportunity to hear from the students.

“ ‘There aren’t any adults here, which is really nice because I think students are more open, and I feel the candidates are more receptive because you’re not worried about what sounds good or what would offend someone,’ Ryan said.

“ ‘I think it gives [the candidates] really good insight, and us a really good insight too,’ Ryan said.”

Taken in part from Goodman, Maddie, Westside *Lance*, Spring 2012

A Community Effort for a Community Superintendent FIRM DECISION

District hires unbiased executive search firm

“The school district hired the firm McPherson and Jacobson to assist in the search for our next superintendent. The firm specializes in executive searches and has helped with both the advertising and interview processes.

...

“Five different panels—a student, Westside Foundation, volunteer, teacher and administrative panel—interviewed each candidate separately.

“All five panels submitted a formal write-up detailing their opinions of the five candidates. The school board will take the panels’ opinions into consideration when making the final decision.

...

“...we believe hiring an experienced firm to help with selecting our next superintendent was a great idea

“McPherson and Jacobson was responsible for bringing in 28 candidates from all over the country, giving the district greater variety than it would have had choosing a superintendent internally.

“The firm also oversaw a more extensive selection process. It suggested the district create the five panels to interview each candidate, helped choose the panels and provided questions the panels should ask the candidate.

“The superintendent deals with the entire community, so it is only logical that the decision is a community effort.

...

“ ‘[The school board] gained a student opinion, a thoughtful, careful consideration of us and what we want in a superintendent, which they can’t always get themselves,’ senior and student panelist Jacob Lehr said.

“This process allowed each group to offer its unique perspective and will encourage the school board to choose a well-rounded candidate.

...

“In addition, this extensive process will hopefully produce an unbiased decision.

“ ‘I was very pleased with how with how it went,’ [Principal Maryanne] Ricketts said. ‘I like how all the Stakeholder groups were involved. I liked that we had a student group who met with each candidate. Everybody took this very seriously. The groups gave the school board good feedback.’

“Every part of the process went through the firm, and, as a result, the process went smoothly.

“The *Lance* believes the school board made the correct decision in hiring McPherson and Jacobson to assist in the superintendent search.”

Taken in part from Westside *Lance*, Spring 2012

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

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

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

...

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

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

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

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

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

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

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

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

...

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

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

From: Nancy VanBeek [<mailto:NVanBeek@WashingtonPavilion.org>]

Sent: Wednesday, November 29, 2006 4:24 PM

To: t_jacobson@macnjake.com

Subject: Thank you

Mr. Jacobson

Thank you so much for your time with us yesterday. The meeting was (surprisingly enough) enjoyable and the way you were able to draw out our ideas, insecurities, needs and wishes. The meeting once again gave me hope for the future of the work we do here.

I look forward to meeting the candidates you feel will be able to meet our varied needs and I am very grateful that you will be with the new Director as he/she takes the position. This transition time will be made much easier with a mentor to provide insight into all the different expectations of the position.

Thank you for being a good listener and a super facilitator.

Nancy Van Beek

KSDC Education Manager

Washington Pavilion of Arts and Science

301 S. Main Ave.

Sioux Falls SD 57104

(605_ 367-7307 ext 2374

www.washingtonpavilion.org

From: Laura Bednar

Sent: Thursday, December 20, 2007 12:05 PM

To: t_jacobson@macnjake.com

Subject: thank you

Dear Dr. Jacobson

.....

Your company has been extremely helpful to me as I have stepped into the superintendency, and I certainly recommend McPherson and Jacobson to anyone that I can! More than anything else, I have no doubt that the follow-up work that is done with School Boards and Superintendents is the most essential piece. I cannot thank you and your consulting team enough for how your leadership and guidance has truly turned our district around! I wish every school district had the opportunity to experience what we have with McPherson and Jacobson.

Thank you again,

Laura Bednar
Superintendent
Stuttgart School District

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

BOARD OF EDUCATION

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

SUPERINTENDENT

Jeffrey L. Baarstad, Ph.D.



June 3, 2015

To Whom It May Concern:

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

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

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

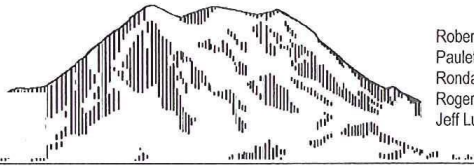
The number and quality of the applicants was reassuring to the board and spoke to the success of the initial planning process and the skillful execution of our plan. I believe that our consultants represented us enthusiastically to potential candidates, thus helping to develop a high quality candidate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

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

A handwritten signature in black ink, appearing to read "B Connolly". The signature is fluid and cursive, with a large initial "B" and a long, sweeping underline.

Betsy Connolly DVM

**EATONVILLE
SCHOOL DISTRICT**
Superintendent Rich D. Stewart



Robert Homan, President
Paulette Gillardi, V-President
Ronda Litzenberger, Director
Roger Andrascik, Director
Jeff Lucas, Director

Together, we commit to excellence in education and preparation for life.

June 21, 2013

Dr. Thomas Jacobson
McPherson & Jacobson
7905 L Street Suite 310
Omaha NE 68127

Dear Dr. Jacobson,

My name is Robert Homan and I am the School Board President with the Eatonville School District. I just wanted to drop you a note of extreme satisfaction about, Al Cohen and Mike Boring, two of your consultants. We have enlisted their services twice now in the last three years and I wanted to let you know what outstanding individuals they are and what a pleasure it has been to work with them!

Al and Mike impressed our Board with their knowledge of the process in hiring a qualified Superintendent. Their ability to advise us on timelines, qualities to look for and experience levels that will work well in our district was invaluable. Finally their professionalism is unmatched when it comes to their ability to work with people and understand perspectives. Their skills to assimilate information and to apply that information to attain the best outcome for the needs of our district was impressive.

Needless to say, that we are and were very happy with the candidate pool along with the selections we have made for our Superintendents of Eatonville Public Schools. I would have no problem recommending either one or both of these men to any District looking for consultants for this process.

We will definitely keep your firm at the top of the list when it comes to consulting on this and any other pertinent service you offer.

On behalf of myself and the rest of the Board of Eatonville School District, we wish to express our appreciation.

Respectfully,

Robert Homan
Board President
Eatonville School District #404

Equal Employment & Educational Opportunities • Eatonville School District #404 • PO Box 698 • Eatonville, WA 98328 • Telephone
(360) 879-1000 • Fax (360) 879-1086



LITTLE ROCK SCHOOL DISTRICT

OFFICE OF THE SUPERINTENDENT

March 1, 2013

Dr. Thomas Jacobson
McPherson & Jacobson, LLC
7905 L Street, Suite 310
Omaha, NE 68127

Dear Dr. Jacobson:

On behalf of the Little Rock School District Board of Directors, I would like to thank you for the professional manner in which the search process for our next superintendent has been conducted. I commend our lead consultant, Ms. Loe Dunn, and her assistants, Dr. Kieth Williams and Dr. John Smith, for guiding us through the process of selecting and interviewing our next leader.

I would recommend your organization to anyone who requires the services of an executive firm to coordinate their search process.

Again, thank you for the professionalism demonstrated by your team. Your service has been invaluable to us.

Sincerely,


Dianne Curry, President
LRSD Board of Directors

Date: Wednesday, September 26, 2012, 10:33 PM

“....

“The entire process of a Superintendent search firm from start to finish has been a learning experience for me and I strongly believe it was made easier because of your knowledge, expertise, just being excellent to work with as well as the over professionalism of the firm.

“Again, thank you for all the assistance you provided to our district....”

Thanks,
Connie McElyea
Moline [Illinois] Board of Education



Reynolds School District
Administration Offices
1204 NE 201st Avenue
Fairview, OR 97024
503.661.7200 • FAX 503.667.6932

April 26, 2012

To Whom It May Concern:

I am the Chair of the Reynolds School District, serve on the Board of a non-profit Women's Shelter, am a Consumer Arbitrator, a very active community advocate, and have extensive Executive and Human Resource Management experience. I am compelled to write on behalf of the firm McPherson & Jacobson's Executive Search Consultant Services.

This year our district contracted with the McPherson & Jacobson to conduct a national search to replace our retiring Superintendent. As promised, they delivered excellent, comprehensive services from start to finish. The fact that we were assigned a senior partner and two regional consultants created synergy and success in the process. Their multi-pronged protocols ensured that all stakeholders both internal and external experienced high levels of confidence in both the process and the outcome.

The range and quality of the service delivery was superior. From facilitating widespread community input for design and delivery of a professional search brochure, to national advertising, screening committee management, a survey, stakeholder forums and press releases our board, staff and community strongly supported the process and are very satisfied.

The individuals assigned to us were Dr. Tom Jacobson, Dr. Bill Dean and Mr. Rich Parker. Their varied skills and years of educational experience is an excellent match for any district. They spent tireless hours of support to address staff, citizen and community involvement concerns. They innovatively united diverse processes and combined their energies to accomplish our goals on an extremely tight timeline during a difficult time for our district. Through it all they remained highly organized, exhibited excellent verbal, written and interpersonal skills, while remaining versatile and reliable. Their services were not only strategic but enthusiastic, effective and solution oriented. They delivered results.

In conclusion, their professional services combined with a caring style made our search robust and effective. Your organization would be fortunate to have them provide the same service.

Please share this information with any parties that are interested or may affect decisions regarding this matter. If you require elaboration, please feel free to contact me. I would be happy to share more information.

Respectfully,

Theresa Delaney Davis

Theresa Delaney Davis
Chair



July 30, 2018

McPherson Jacobson, LLC
7905 L Street, Suite 310
Omaha, Nebraska 68127

To Whom it May Concern:

With this being my first superintendent search, I would like to say I had the good fortune of working with Dr. Robert Williams. His presentation to the school board was thorough, accurate and well documented. Immediately, we knew he had the talent and skills far beyond our responsibilities to give us what we were looking in for our superintendent.

There were several factors we were looking for in our search, Dr Williams was very transparent in the process and always gave us the information we asked for. The step by step process was handled very professionally. After each step was given to us, he allowed us the freedom to act accordingly to each applicant. He was never biased on any one person but gave us valuable information in general. After the board gave him what we were looking for in our search, he used his knowledge and reputation to acquire several top notch applicants to apply. Without him knowing these people we probably would not have ended up with the superintendent we have. The community and staff of our school has embraced our superintendent and we are heading toward improving our scores and the financials are improved with several projects along the way.

I am honored to write this letter on behalf of McPherson Jacobson, LLC and I would encourage anyone that is searching for a superintendent to call them, you won't be disappointed!

Sincerely,

Jeff Owyong
McGehee School District President

July 13, 2018

From: Julie Sexton, Board President
West Branch Community School District, West Bend, Iowa

Our board made the decision to hire McPherson & Jacobson to conduct our search for a new Superintendent and we are glad we did! Hiring a Superintendent is one of the most important responsibilities the board has so we wanted to make sure we did what we could to find the best fit for our students and district. Our consultant (Gary McAndrew) was on task as soon as the hiring occurred. We had to move quickly and we had a timeline to us immediately. The expertise and professionalism brought into this process was remarkable. We ended up with many qualified candidates. A lot of time was put in by our consultant to make sure we had all of the information necessary to make a well-informed decision as to who our final candidates would be for the board to interview. It was also important to the board that our search be conducted with as much transparency as possible and we were able to achieve this by having stakeholder groups provide input and be meaningfully involved in the process. McPherson & Jacobson use the motto "It's About the Kids" which rings true in all our board does, especially in regard to the search for a new Superintendent. In our partnership with this search firm, we were able to find a Superintendent we believe will bring quality leadership which in turn will continue to focus on quality education and move our district forward. Our board is very pleased with the outcome of our search and would be happy to share our experience with any other boards who may be looking for a Superintendent search firm in the future.



Leslie Fye

6 hrs · 🌐

I just have to brag on my school district and the process they have adopted to select our next School District Superintendent. SOCSO hired an awesome firm - McPherson and Jacobson - to conduct our Superintendent search. Under their guidance the district has had listening sessions in the community to gather input for what our vision was/is for the next Superintendent. Applications are in and the Board selected their top 3. Interviews began today. The candidates are being interviewed by faculty focus groups and community stakeholder focus groups. The focus groups participated in creating the main group interview questions and were allowed to ask other questions at the end of the interview. Feedback from the focus group was documented and will be given to the School Board. The School Board will hold their own private interview. Whatever the result, the process has been a positive one for our community!

2 Shares



*Starkville Oktibbeha Consolidated School District, Starkville, Mississippi,
February 2017*

Applicant Diversity

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

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

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

<u>Search Year</u>	<u>School District/Entity</u>	<u>Person Placed</u>
2017-2018	Berkeley USD, CA— Exec. Dir for Special Education	Dr. Jan Hamilton
2017-2018	Okanogan School District, OR	Mrs. Ashley Goetz
2017-2018	Foreman School District, AR	Mrs. Patricia Tankersley
2017-2018	Jackson Public Schools, MS	Dr. Errick Greene
2017-2018	McCleary School District, WA	Ms. Shannon Ramsey
2017-2018	Fort Sage Unified School District, Herlong, CA	Dr. Christopher Bonn
2017-2018	Madison County School District, Ridgeland, MS	Ms. Kimber Halliburton
2017-2018	Roseville Joint Union High School District, CA	Dr. Denise Herrmann
2017-2018	Mabton School District, WA	Mr. Joseph Castilleja
2017-2018	Saugus Union School District, Santa Carlita, CA	Dr. Colleen Hawkins
2017-2018	Denair Unified School District, CA	Dr. Teresia Chevalier-Metzger
2017-2018	Reynolds School District, Fairview, OR	Dr. Danna Diaz
2017-2018	Soap Lake School District, WA	Ms. Darnella Pray
2017-2018	East End School District, Bigelow, AR	Ms. Lori Edgin
2017-2018	Ogden Community School District, IA	Dr. Pamela Dodge
2017-2018	Webster City Community Schools, IA	Dr. Amanda Ross
2017-2018	Liberty Elementary School District, Buckeye AZ	Dr. Lori Shough
2017-2018	South Central Nebraska Unified #5, Fairfield, NE	Ms. Julie Otero
2017-2018	Ellensburg School District, WA	Mrs. Jinger Haberer
2017-2018	Parlier Unified School District, CA	Mr. Jamie Robles
2016-2017	Cold Spring School District, Santa Barbara, CA	Dr. Amy Alzina
2016-2017	New Haven Unified School Dist., CA	Dr. Arlando Smith
2016-2017	Carlsbad Municipal Schools, NM	Dr. Gregory Rodriguez
2016-2017	School District of Fort Atkinson, WI	Dr. Beverly Brown

2016-2017	Starkville Oktibbeha Consolidated School District, MS	Dr. Eddie Peasant
2016-2017	Richland School District, CA	Dr. Dagoberto Garcia
2015-2016	Oxnard Union High School Dist., CA	Ms. Penelope DeLeon
2015-2016	Alisal Union School District, CA	Dr. Hector Rico
2015-2016	Johnstonville Elem. School Dist., CA	Dr. Melanie Spears
2015-2016	East Dubuque School District, IL	Mrs. Tori Lindeman
2015-2016	Hemet Unified School District, CA	Ms. Christi Barrett
2015-2016	Ottumwa CSD, IA	Ms. Nichole Koolker
2015-2016	Charlotte-Mecklenburg Schools, NC	Dr. Clayton Wilcox
2015-2016	Rapid City Area School District, SD	Dr. Lori Simon
2015-2016	Francis Howell School District Saint Charles, MO	Dr. Mary Hendricks-Harris
2015-2016	Glendale Unified School District, CA	Mr. Winfred Roberson
2015-2016	Grand Island Public Schools, NE	Dr. Tawana Grover
2015-2016	Othello School District No. 147, WA	Dr. Kenneth Hurst
2014-2015	Penn Valley Union Elementary School District, CA	Dr. Torie England
2014-2015	Newcastle Elem. School District, CA	Ms. Denny Rush
2014-2015	Seattle Public Schools, WA (Director of Enrollment Planning)	Ms. Ashley Davies
2014-2015	Caney Valley USD 436, KS	Mr. Blake Vargas
2014-2015	Birmingham City Schools, AL	Dr. Kelley Gacutan
2014-2015	Cherokee Community School Dist., IA	Ms. Kimberly Lingenfelter
2014-2015	Chief Leschi Schools, Puyallup, WA	Dr. Amy Eveskcige
2014-2015	Colts Neck Township Schools, NJ	Ms. Mary Jane Garibay
2014-2015	Conejo Valley Unified School District Thousand Oaks, CA	Dr. Ann Bonitatibus
2014-2015	El Monte Union High School Dist., CA	Dr. Irella Perez
2014-2015	Gustine Unified School District, CA	Mr. William Morones
2014-2015	Hot Springs School District, AR	Mr. Mike Hernandez
2014-2015	San Juan Island School District Friday Harbor, WA	Dr. Danna Diaz
2014-2015	Sunnyside Unified School District Tucson, AZ	Mr. Steven Holmes
2014-2015	Unity Charter School, Morristown, NJ	Ms. Connie Sanchez
2014-2015	Watson Chapel School District Pine Bluff, AR	Dr. Connie Hathorn
2013-2014	Arkansas Arts Academy(Benton County School of Arts), AR	Mrs. Mary Ley
2013-2014	Caddo Parish Public Schools Shreveport, LA	Dr. Theodis Lamar Goree
2013-2014	Fallbrook Union High School District, CA	Dr. Hugo Pedroza
2013-2014	Gardner Public Schools, MA	Ms. Denise Clemons
2013-2014	Hermitage School District, AR	Dr. Tracy Tucker
2013-2014	Mary M. Knight School Dist., WA	Dr. Ellen Perconti
2013-2014	Winship-Robbins Elem. Schools, CA	Dr. Laurie Goodman
2013-2014	Valley Springs School Dist., AR	Ms. Judy Green

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
Educational Consultant
Athens, Alabama

Dr. Paul McKendrick
Retired Superintendent
Tuscaloosa, Alabama

Alaska Consultants

Mr. Shawn Arnold
Superintendent
Valdez, Alaska

Mr. Harry Rogers
Retired Superintendent
Petersburg, Alaska

Arizona Consultants

Dr. William Dean
Retired Superintendent
Tucson, Arizona

Ms. Barbara Dean
Retired from AASA
Tucson, Arizona

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

Dr. Les Huth
Retired Professor
Scottsdale, Arizona

Mr. Lawrence Mason
Retired Superintendent
Gold Canyon, Arizona

Mr. Pat Nauroth
Retired Superintendent
Cave Creek, Arizona

Ms. Jennifer Tanner
Board Member
El Mirage, Arizona

Arkansas Consultants

Mr. Wayne Gibson
Board Member
El Dorado, Arkansas

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

Dr. Diana Julian
Professor
Benton, Arkansas

Mr. Terry Julian
Retired Administrator
Benton, Arkansas

Mr. Bobby Lester
Retired Superintendent
Jacksonville, Arkansas

Dr. John H. Moore
Retired Superintendent
Magnolia, Arkansas

Dr. Megan Slocum
Associate Superintendent
Fayetteville, Arkansas

Dr. Tony Thurman
Superintendent
Cabot, Arkansas

Mr. Andrew Tolbert
Retired Superintendent
Warren, Arkansas

Mr. Mitch Walton
Professor
Searcy, Arkansas

Mr. Jerrod Williams
Superintendent
Bauxite, Arkansas

Dr. Kieth Williams
Retired Superintendent
Bald Knob, Arkansas

California Consultants

Mrs. Janice Adams
Retired Superintendent
Benicia, California

Mrs. Nicole Anderson
Educational Consultant
Vallejo, California

Ms. Aida Buelna
Retired Superintendent
Woodland, California

Mr. Robert Challinor
Retired Superintendent
Victorville, California

Mr. Julian Diaz
Retired Superintendent
Oroville, California

Mr. Robert Ferguson
Retired Superintendent
Napa, California

Mr. William Huyett
Retired Superintendent
Lodi, California

Mr. Benjamin Johnson II
Board Member
Riverside, California

Dr. Barry Kayrell
Retired Superintendent
Murrieta, California

Dr. Steven Lowder
Retired Superintendent
Stockton, California

Dr. Michael McCoy
Superintendent
Bakersfield, California

Mr. Jesse Modesto
Retired Administrator
Woodland, California

Mr. Dennis Murray
Retired Superintendent
Murrieta, California

Dr. Marilyn Shepherd
Retired Superintendent
Friant, California

Dr. John Sugiyama
Retired Superintendent
Indio, California

Mr. Edward Velasquez
Retired Superintendent
Chino, California

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

Colorado Consultants

Ms. Peg Portscheller
Educational Consultant
Parachute, Colorado

Dr. Norman Ridder
Retired Superintendent
Arvada, Colorado

Florida Consultants

Dr. Marjorie Alexander Wallace
Retired IU Director
Palm Harbor, Florida

Georgia Consultants

Dr. Michelle King
Georgia Department of Education
Atlanta, Georgia

Idaho Consultants

Dr. Linda Clark
Retired Educator
Boise, Idaho

Dr. William Dean
Retired Superintendent
Post Falls, Idaho

Ms. Barbara Dean
Retired from AASA
Post Falls, Idaho

Mr. Don Hague
Consultant Emeritus
Retired Superintendent
Sandpoint, Idaho

Mr. Edward Velasquez
Retired Superintendent
Hayden, Idaho

Illinois Consultants

Dr. John Closen
Professor
Western Illinois University
Peoria, Illinois

Dr. Lloyd Kilmer
Retired Professor
Moline, Illinois

Iowa Consultants

Ms. Kimberly Antisdell
Retired Administrator
Grimes, Iowa

Mr. Dennis Bahr
Retired Superintendent
Webster City, Iowa

Mr. Michael Billings
Retired Superintendent
Story City, Iowa

Dr. Paul Gausman
Superintendent
Sioux City Comm. Schools
Sioux City, Iowa

Dr. Lloyd Kilmer
Retired Professor
Davenport, Iowa

Mr. Gary McAndrew
Former Board Member
Peosta, Iowa

Mr. Lyle Schwartz
Retired Superintendent
Story City, Iowa

Dr. Richard Sundblad
Consultant Emeritus
Urbandale, Iowa

Dr. Michael Teigland
Retired Superintendent
Indianola, Iowa

Mr. Richard Vande Kieft
Former Board Member
Cedar Falls, Iowa

Dr. Steve Williams
Consultant Emeritus
Monticello, Iowa

Kansas Consultants

Dr. Brad Rahe
Retired Superintendent
Mulvane, Kansas

Mr. Dennis Burke
Retired Superintendent
Baxter Springs, Kansas

Dr. James Christman
Retired Professor
Pittsburg, Kansas

Dr. Justin Henry
Superintendent
Goddard, Kansas

Mr. Von Lauer
Retired Superintendent
Sabetha, Kansas

Dr. Bradley Rahe
Retired Superintendent
Holton, Kansas

Mr. Howard Shuler
Consultant Emeritus
Topeka, Kansas

Louisiana Consultants

Ms. Janet Dixon
Board Member
Alexandria, Louisiana

Ms. Lorethie Dunn
Former Board Member
Bastrop, Louisiana

Dr. T. Lamar Goree, Jr.
Board Member
Shreveport, Louisiana

Dr. Gerald Keller
Past Superintendent/Board Member
Reserve, Louisiana

Mrs. Janet Pope
LSBA Staff Member
Lafayette, Louisiana

Mr. John Smith
Board Member
St. Rose, Louisiana

Michigan Consultants

Mr. Lawrence Mason
Retired Superintendent
Spring Lake, Michigan

Minnesota Consultants

Dr. Leslie Huth
Professor Emeritus
Oak Park Heights, Minnesota

Ms. Pamela Lindberg
School Board Director
New Hope, Minnesota

Dr. Linda Madsen
Retired Superintendent
Forest Lake, Minnesota

Dr. Gary Schnellert
Retired Professor
Sartell, Minnesota

Mississippi Consultants

Dr. Tom Clark
Retired Superintendent
Petal, Mississippi

Dr. James Hutto
Retired Superintendent
Petal, Mississippi

Mr. Ronald Walker
Retired Superintendent
Hattiesburg, Mississippi

Missouri Consultants

Dr. Randal Bagby
Superintendent, La Monte R-IV School Dist.
Gravois Mills, Missouri

Mr. Destry Brown
Superintendent
Clinton, Missouri

Dr. James Christman
Retired Professor
Carl Junction, Missouri

Dr. Dennis Cooper
Retired Superintendent
Springfield, Missouri

Ms. Renee Goostree
Professor
Pittsburg State University
Joplin, Missouri

Dr. Jeanette Tendai
Retired Educator
St. Louis, Missouri

Dr. Philip Schoo
Superintendent Emeritus
Consultant Emeritus
Lake Ozark, Missouri

Dr. Judith Sclair-Stein
Retired School Administrator
Chesterfield, Missouri

Montana Consultants

Dr. Michael McLaughlin
Educational Consultant
Butte, Montana

Nebraska Consultants

Dr. Mike Cuning
Retired Superintendent
Hershey, Nebraska

Mr. Alan Ehlers
Superintendent
Madison, Nebraska

Dr. Jerry Ehlers
Retired Superintendent
Ainsworth, Nebraska

Dr. Randall Gilson
Superintendent
Blair, Nebraska

Dr. Derrick Joel
Superintendent
Raymond, Nebraska

Dr. Mike Lucas
Superintendent
York, Nebraska

Mrs. Jane McDaniel
Former Board Member
Plattsmouth, Nebraska

Mr. Glen Morgan
Retired Superintendent
Fremont, Nebraska

Dr. Randy Nelson
Consultant Emeritus
Retired Superintendent
Seward, Nebraska

Dr. James Ossian
Professor Emeritus
Wayne State College
Wayne, Nebraska

Dr. Aaron Plas
Superintendent
Lakeview Community Schools
Columbus, Nebraska

Mr. Darren Tobey
Superintendent
Broken Bow, Nebraska

Dr. Jeffery West
Executive Director, ESU 13
Gering, Nebraska

Dr. Rob Winter
Retired Superintendent
Grand Island, Nebraska

New Jersey Consultants

Dr. Ralph Ferrie, Jr.
Superintendent
Brick, New Jersey

Floral Park, New York Dr. Candis Finan
Retired Superintendent
Summit, New Jersey

New Mexico Consultants

Mr. Vernon Asbill
Retired Superintendent
Artesian, New Mexico

New York Consultants

Dr. William Christensen
Superintendent, Sidney Central
Binghamton, New York

Dr. Ralph Ferrie, Jr.
Superintendent, Sewanhaka
Central High School District
Floral Park, New York

Dr. John Gratto
Professor
Plattsburgh, New York

Dr. Martin Handler
Superintendent, Pine Planes
Elizaville, New York

North Dakota Consultants

Mr. Robert Marthaller
Retired Superintendent
Bismarck, North Dakota

Dr. Cory Steiner
Superintendent
Northern Cass School District
Hunter, North Dakota

Ohio Consultants

Dr. Renee Willis
Superintendent, Richmond Heights
Willoughby Hills

Oklahoma Consultants

Dr. Robert Neel
Retired Superintendent
Norman, Oklahoma

Oregon Consultants

Dr. Robert Clark
Superintendent
Milton-Freewater, Oregon

Pennsylvania Consultants

Dr. Marjorie Alexander Wallace
Retired IU Director
Waterford, Pennsylvania

Dr. Candis Finan
Retired Superintendent
Matamoras, Pennsylvania

South Dakota Consultants

Mr. Jack Broome
Retired Superintendent
Burke, South Dakota

Dr. Henry Kusters
Retired ASBSD Asst. Executive Director
Pierre, South Dakota

Dr. Robert Mayer
Retired Professor
Sioux Falls, South Dakota

Dr. Augustine (Gus) Scully
Professor
South Dakota State University
Rapid City, South Dakota

Tennessee Consultants

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

Texas Consultants

Dr. Donald Mathis
Educational Consultant
Cypress, Texas

Virginia Consultants

Dr. Scott Jefferies
Superintendent
Wytheville, Virginia

Washington Consultants

Dr. Steven Lowder
Retired Superintendent
Vancouver, Washington

Dr. Nathan McCann
Superintendent
Ridgefield, Washington

Mr. Michael Parker
Retired Superintendent
Orondo, Washington

Mr. Richard Parker
Former Board Member
Mukilteo, Washington

Mr. Richard Stewart
Superintendent
Ferndale, Washington

Wisconsin Consultants

Dr. Brian Busler
Superintendent
Oregon, Wisconsin

Dr. Brian Hanes
Retired Superintendent
Oostburg, Wisconsin

Mr. Damian La Croix
Superintendent
Suamico, Wisconsin

Dr. Melissa Thompson
Superintendent
Swallow School District
Hartland, Wisconsin

Wyoming Consultants

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

Dr. Chuck Grove
Retired Superintendent
Pinedale, Wyoming

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>			
Tucson Unified School District--General	Tucson	2015/16	48,000
Tucson Unified School District--Internal Auditor	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
Sunnyside Unified School District No. 12	Tucson	2014/15	17,400
Liberty Elementary School District	Buckeye	2017/18	3,500
Salt River Schools--Dir. of Human Resources	Scottsdale	2017/18	1,000
<u>Arkansas</u>			
Van Buren School District	Van Buren	2014/15	5,900
Marion School District	Marion	2016/17	4,113
Jacksonville-North Pulaski School District	Jacksonville	2014/15	4,000
Pine Bluff School District	Pine Bluff	2015/16	4,000
Hot Springs School District	Hot Springs	2014/15	3,689
Batesville School District	Batesville	2016/17	3,372
Harrison School District	Harrison	2016/17	2,800
Watson Chapel School District	Pine Bluff	2014/15	2,721
Star City School District	Star City	2015/16	1,645
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
Harrisburg School District	Harrisburg	2017/18	1,300
McGehee Public Schools	McGehee	2016/17	1,186
Smackover-Norphlet School District	Smackover	2018/19	1,150
Newport School District	Newport	2018/19	1,100
McCrary School District	McCrary	2018/19	665
East End School District	Bigelow	2017/18	650
East End School District	Bigelow	2014/15	622
Magazine School District	Magazine	2014/15	520
Foreman School District	Foreman	2017/18	509
Concord School District	Concord	2018/19	440

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>California</u>			
Elk Grove Unified School District	Elk Grove	2014/15	62,000
Glendale Unified School District	Glendale	2015/16	26,200
Hemet Unified School District	Hemet	2015/16	21,000
Conejo Valley Unified School District	Thousand Oaks	2014/15	19,500
Ventura Unified School District	Ventura	2016/17	17,000
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
El Monte Union High School District	El Monte	2014/15	9,500
Alisal Union School District	Salinas	2015/16	9,000
Calexico Unified School District	Calexico	2017/18	8,966
Benicia Unified School District	Benicia	2014/15	5,000
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	2017/18	3,435
Nevada Joint Union High School District	Grass Valley	2017/18	2,600
Golden Valley Unified School District	Madera	2017/18	1,950
Anderson Union High School District	Anderson	2018/19	1,800
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
Lakeside Union School District	Bakersfield	2014/15	1,310
Sonora Union High School District	Sonora	2017/18	1,000
Pollock Pines Elementary School District	Pollock Pines	2015/16	800
Newcastle Elementary School District	Newcastle	2014/15	796
Penn Valley Union Elementary School District	Penn Valley	2014/15	700
Sausalito Marin City School District	Marin City	2015/16	524
Sierra-Plumas Joint Unified School	Loyalton	2018/19	425
Fort Sage Unified School District	Herlong	2016/17	310
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
<u>Colorado</u>			
Thompson School District R2-J	Loveland	2017/18	16,000
Morgan County School District	Fort Morgan	2017/18	3,300
Clear Creek School District RE-1	Idaho Springs	2018/19	765

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>Georgia</u>			
Troup County School System	La Grange	2018/19	12,300
<u>Idaho</u>			
Coeur d'Alene Public Schools	Coeur d'Alene	2016/17	11,000
Lake Pend Oreille School District	Ponderay	2018/19	3,500
<u>Illinois</u>			
Rock Island-Milan School District #41-- Elementary Principal	Rock Island	2018/19	6,300
East Dubuque School District #119	East Dubuque	2015/16	718
Scales Mound Community Unit School District	Scales Mound	2014/15	245
<u>Iowa</u>			
Waukee Community School District	Waukee	2018/19	11,000
Marshalltown Community School District	Marshalltown	2015/16	5,085
Ottumwa Community School District	Ottumwa	2015/16	4,595
Western Dubuque Community School District	Farley	2014/15	2,991
Marion Independent School District	Marion	2018/19	1,932
Webster City Community Schools	Webster City	2017/18	1,800
Center Point-Urbana Community School District	Center Point	2015/16	1,543
West Liberty Community School District	West Liberty	2016/17	1,307
Cedar Rapids Community School District	Cedar Rapids	2016/17	1,300
Clear Lake Community School District	Clear Lake	2015/16	1,200
PCM Community School District	Monroe	2014/15	1,100
Monticello Community School District	Monticello	2015/16	1,096
West Burlington Independent School District	West	2018/19	1,000
Cherokee Community School District	Cherokee	2014/15	940
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
North Cedar Community School District	Stanwood	2015/16	800
MMCRU Schools (Marcus Meridian Cleghorn)	Marcus	2017/18	800
Colfax-Mingo School District	Colfax	2014/15	746
North Kossuth CSD & North Union CSD	Swea	2015/16	743
Ogden Community School District	Ogden	2017/18	700
AGWSR Community Schools	Ackley	2017/18	624
PCM Community School District--Principal	Monroe	2014/15	

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>Kansas</u>			
Lawrence Public Schools USD 497	Lawrence	2015/16	11,716
Lansing Unified School District 469	Lansing	2015/16	2,600
Ottawa USD 290	Ottawa	2017/18	2,386
Independence USD #446	Independence	2014/15	2,000
Chapman USD 473	Chapman	2015/16	1,065
Burlington USD 244	Burlington	2015/16	854
Caney Valley USD #436	Caney	2014/15	810
Wellsville USD 289	Wellsville	2017/18	782
Lyndon USD 421	Lyndon	2016/17	400
Stafford USD 349	Stafford	2016/17	200
<u>Mississippi</u>			
Jackson Public Schools	Jackson	2017/18	27,062
Madison County School District	Ridgeland	2017/18	13,225
Gulfport School District--Middle School	Gulfport	2018/19	5,500
Starkville Oktibbeha Consolidated School	Starkville	2016/17	5,200
<u>Missouri</u>			
Hazelwood School District-Director of	Florissant	2018/19	18,000
Hazelwood School District--Director of Finance	Florissant	2018/19	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
<u>Montana</u>			
Shepherd School District #37	Shepherd	2016/17	750
<u>Nebraska</u>			
Learning Community of Douglas and Sarpy Counties--CEO	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
Fairbury Public Schools	Fairbury	2014/15	901
Broken Bow Public Schools	Broken Bow	2014/15	810
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
Centura Public Schools	Cairo	2017/18	486

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>Nebraska (continued)</u>			
Yutan Public Schools	Yutan	2014/15	477
Doniphan-Trumbull Public School	Doniphan	2017/18	465
Superior Public Schools	Superior	2017/18	435
Southern Public Schools	Wymore	2016/17	395
Pawnee City Public Schools	Pawnee City	2015/16	297
Axtell Community School	Axtell	2016/17	264
Creek Valley Public Schools	Chappell	2014/15	252
Potter-Dix Public Schools	Potter	2014/15	191
<u>New Hampshire</u>			
Manchester School District	Manchester	2018/19	13,803
<u>New Jersey</u>			
Colts Neck Township Schools	Colts Neck	2014/15	969
Harding Township School	New Vernon	2014/15	330
Unity Charter School--Director of Schools	Morristown	2014/15	205
<u>New Mexico</u>			
Carlsbad Municipal Schools	Carlsbad	2016/17	6,410
<u>North Carolina</u>			
Charlotte-Mecklenburg Schools	Charlotte	2015/16	145,363
Dare County Schools	Nags Head	2016/17	5,500
<u>Ohio</u>			
Indian Hill Exempted Village School District	Cincinnati	2018/19	2,000
<u>Oklahoma</u>			
Seminole Public Schools	Seminole	2019/20	1,700
<u>Oregon</u>			
Bend-La Pine Schools	Bend	2014/15	17,300
Reynolds School District	Fairview	2017/18	11,200
Springfield Public Schools	Springfield	2018/19	10,700
North Bend School District	North Bend	2018/19	2,300
<u>South Carolina</u>			
Jasper County School District	Ridgeland	2015/16	3,000

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>South Dakota</u>			
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
<u>Utah</u>			
Park City School District--Chief Academic	Park City	2018/19	4,700
Park City School District--Chief Operations	Park City	2018/19	4,700
Park City School District--Director of Talent	Park City	2018/19	4,700
<u>Virginia</u>			
Culpeper County Public Schools	Culpeper	2014/15	8,001
<u>Washington</u>			
WSSDA--Executive Director	Olympia	2015/16	
Seattle Public Schools--Director of Enrollment	Seattle	2014/15	52,999
Clover Park School District	Lakewood	2018/19	12,885
Tahoma School District No. 409	Maple Valley	2017/18	8,200
Tumwater School District	Tumwater	2014/15	6,700
Longview School District No. 122	Longview	2014/15	6,320
Shelton School District	Shelton	2014/15	4,115
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
Tonasket School District	Tonasket	2014/15	1,200
Chimacum School District	Chimacum	2014/15	1,100
Mabton School District	Mabton	2017/18	1,000
Coupeville School District	Coupeville	2017/18	980
Kalama Schools	Kalama	2014/15	950
Chief Leschi Schools	Puyallup	2014/15	890
Chewelah School District	Chewelah	2017/18	815
San Juan Island School District	Friday Harbor	2014/15	750
Quilcene School District	Quilcene	2017/18	650
Kittitas School District	Kittitas	2014/15	600
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
Brighton School (Nobel Learning Comm.)-- Head of Schools	Mountlake Terrace	2018/19	383
Kittitas School District--Secondary Principal	Kittitas	2014/15	350

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>Washington (continued)</u>			
McCleary School District	McCleary	2017/18	325
McCleary School District (grades PreK-8)	McCleary	2014/15	290
Kittitas School District--Elementary Principal	Kittitas	2014/15	250
Crescent School District	Joyce	2015/16	250
Thorp School District	Thorp	2017/18	170
Wishkah Valley School District	Aberdeen	2014/15	140
Skykomish School District	Skykomish	2015/16	45
<u>Wisconsin</u>			
West Bend School District	West Bend	2017/18	6,909
DeForest Area School District	DeForest	2015/16	3,625
School District of Fort Atkinson	Fort Atkinson	2016/17	2,900
Clinton Community School District	Clinton	2014/15	1,101
Bristol School District No. 1	Bristol	2015/16	770

**Eagle Point School District
Superintendent Search 2019/2020
September 5, 2019**

**Joint Proposal
(Oregon School Boards
Association & NextUp
Leadership)**



Greg McKenzie

Ph: 503.752.2438
gregmckenzie@att.net

1470 Rosemont Road
West Linn, OR 97068



Recruiting • Training • Assessment • Facilitation

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September 5, 2019

Dan Hodges, Board Chair
Eagle Point 9 School District
PO Box 548
Eagle Point, Oregon 97524-0548

Re: Superintendent Search – 2019/2020

Dear Dan Hodges and Board of Directors,

INTRODUCTION

We are submitting this Proposal to the Eagle Point School District Board for a superintendent search with the position beginning work on July 1, 2020. This proposal is jointly submitted by **Oregon School Boards Association (OSBA)** and **NextUp Leadership** to work collaboratively to provide the search services. For this search OSBA would take the lead and NextUp Leadership will provide support services. While we have included information about our search services, prior searches and what the Eagle Point School District search might include, we want to emphasize that each of our executive searches can be customized to meet the District's needs and maximize use of the District's resources.

We are a team of educational search consultants organized together for superintendent and administrator searches. During the 2017-18 search season, we joined forces with NextUp Leadership to provide more comprehensive services to school districts for some searches. This year we are taking the joint effort further. We will merge our strengths to ensure that you find the right educational leader for your school district.

OSBA has a long history of providing an array of comprehensive services to its members – Oregon school boards. In addition to the search process, OSBA can provide customized services to support the new leadership team – Board and Superintendent. NextUp Leadership brings outstanding marketing and recruiting skills to the search process as well as a proven process for successful hires. We have a database of over 25,000 educators with whom we communicate on a regular basis about job vacancies in the Pacific Northwest. This direct, active marketing strategy has created a type of social community and produced some of the highest quantity and quality candidate fields in the state of Oregon over the last several years.

For this search **Steve Kelley** of OSBA and will be the lead consultant with **Sarah Herb** of OSBA, **Greg McKenzie**, **Mike Taylor** and **Milt Dennison** of NextUp Leadership providing support where needed. During the search you may be introduced to other members of our search team, as needed. Biographies for each consultant on our search team are enclosed. Even though you will enjoy the benefits of two experienced executive search agencies, the cost of the search will not increase. Annually, together we assist with searches for about 15-20 superintendent and other administrator positions in Oregon.

Our fundamental beliefs about a successful executive leadership searches revolve around three core principals – Relationships, Recruiting, and Results.

RELATIONSHIPS

Successful searches are not the result of having a remote headquarters in a big city in another state. On the contrary, superintendent searching is about local connections and networks. Building a strong relationship with relevant stakeholder groups is a key characteristic of our success in superintendent searches. We focus on:

- Community, staff and student engagement to develop the search criteria
- Frequent and thorough coaching, training, facilitation and reporting with the Board
- Strict attention to candidate confidentiality to safeguard their current positions
- Involving staff and community in appropriate search activities asking for their advice
- OSBA provides board development/training to follow up after the search
- Simply, working harder than other search organizations

Our philosophy about superintendent searches is slightly different from other search firms and associations. Basically, we want to become the District's search partner, not just serve as consultant and supervise a process - a subtle, but important difference in our working relationship. Together we look for the right candidate.

RECRUITING

Here's where we differ significantly from other search organizations and national search firms. We do not just bring forward to the Board a group of our favorite candidates/applicants who have signed up with the firm to find a job. Instead, we reach out by e-mail messages directly to the computer screens, tablets and smart phones for over 25,000 superintendents, school administrators, and education college faculty across the country, with heavy emphasis on the western United States. This method of communication and marketing for positions has proven to be enormously successful. We also take full advantage of today's electronic social media to recruit candidates. Oh, yes, and we also advertise and recruit regionally and nationally in a more traditional sense by posting on online educator job boards. Not only do we passively recruit by posting/advertising the position, but we also actively recruit viable candidates with direct e-mail communication and telephone calls.

RESULTS

Our method of recruiting has resulted in candidate fields significantly larger than our competition and we deliver to the Board all qualified applications for review, not just a selected few. We report actual applications and not merely candidates who expressed interest or submitted an inquiry. Over the past 5 years the average-size search fields for districts looking for a full-time superintendent has ranged from 25-34 applicants for each position. If working together we don't find a suitable fit for your district in the initial candidate field, we simply keep working the project until someone acceptable is found.

Combined our search experience for Oregon school superintendent searches is unmatched. OSBA has conducted over 500 executive searches for school districts, education service districts, community colleges and other state agencies since 1984. NextUp Leadership has conducted over 150 superintendent and school administrator searches over the last ten years. **We know and serve the state of Oregon better than anyone in the business.** We are committed to your success!

TRANSITION PLAN

Because the first year is so critical for setting the tone of professional relationships, OSBA, in conjunction with Confederation of Oregon School Administrators (COSA), provides a unique collaboration designed to support the Superintendent and Board. OSBA will meet with you and your new chief executive to:

- a) Review your district's vision, mission and goals (strategic plan) with the new Board and Superintendent team;
- b) Design effective communication and PR strategies designed to introduce your new executive to the community;
- c) Discuss the roles and responsibilities of the Board and Superintendent;
- d) Create an effective operating agreement;
- e) Establish/review the Superintendent's performance evaluation system and timeline.

PRICE

Based on the scope of work anticipated for this search, the **Basic Fee** price for a full-service Consultant supervised search as described in the Search Overview later in this Proposal is **\$12,500** which includes a standard package of advertising and up to 12 hours of professional development for the Board and new Superintendent. **Reimbursable expenses** incurred by the Consultants **are additional** which typically include travel, lodging, and meals.

Please circulate this Proposal to the Board for their consideration. We want to help find a difference-maker for your District. We're available to answer questions related to a superintendent search in general and this Proposal specifically. For addition information, please do not hesitate to ask. My contact phone number (Steve's) is 541-401-3962 (cell).

Best Regards,



Steve Kelley
Director of Board Development and Executive Searches
Oregon School Boards Association



Greg McKenzie, Search Consultant
NextUp Leadership

Section A

Proposed Search Plan



SEARCH PROCESS OVERVIEW



All searches conducted by NextUp Leadership and Oregon School Boards Association are customizable to meet the needs of the District and a specific calendar is developed in the Planning Phase to fit the District's schedule. **For illustration purposes**, a “sample” search might include the following components along with a projected general timetable that positions the District in the candidate market at the time needed for optimal exposure to prospective candidates.

Date

Activity

Planning Phase

Oct, 2019 Search organization and planning meeting with Consultant(s), Board Chair, Board Secretary (exact Date TBD – probably during group meeting dates)

- Division of responsibility
- Scope of work
- Develop draft search calendar
- Develop draft search budget
- Discuss search literature and marketing strategy
- Identify advertising/posting targets
- Prepare search forms
- Identify application requirements

Qualifications Phase

Oct - Nov, 2019 Conduct survey for candidate qualifications, criteria and candidate profile with some or all of the following groups:

- Community & business leaders
- Local government leaders
- Union leaders
- Administrators
- Teachers
- Classified staff
- Confidential staff
- Student leaders

Board meeting (public meeting - open session)

- Report results of candidate qualifications process
- Take public input on qualifications
- Board adopt qualifications
- Board adopt search calendar

Board declare position vacant
Adopt salary range (Consultant provides salary comparison)

Advertising Phase

Dec - Jan, 2020

- Consultants prepare search literature and post the position
- Open the application period
- Post notice of vacancy on District website
- Distribute notice of vacancy to direct e-mail distribution list
 - Over 25,000 educators nationwide
 - Focus distribution on Western US
- Advertise vacancy on association and search websites
 - COSA included in contract price
 - WASA included in contract price
 - LinkedIn notice to connections
 - Others as agreed with Board

Recruitment Phase

Dec - Jan, 2020

- Consultants recruit candidates
 - Distribute application packets to prospective candidates
 - Correspond with prospective candidates
 - Receive, process and organize applications
 - Board appoints screening committee
- Close application period
 - Consultant assembles applications and screening packets

Screening Phase

Jan - Feb, 2020

- Board meeting (public meeting - open session)
 - Screening group and Board training for application review
 - Begin reviewing applications (executive session)
- Continue reviewing applications individually
- Special Board meeting
 - Debrief screening results (executive session)
 - Identify interview candidates (executive session)
 - Interview training for Board (public session)
 - Organize initial candidate interviews (public session)

Interview Phase

Feb - Mar, 2020

- Board meeting (executive session) (exact dates/times TBD)
- Conduct initial interviews with selected candidates
- Board meeting (executive session) (after last interview)
 - Debrief candidate interviews
 - Select finalist(s)
- Consultant notifies finalists

- Board and Consultants conduct reference checks
 - Telephone contact with references Internet searches
 - Licensure investigation
 - Organize site visits in finalists' home district
- Organize "day in the district" for finalists
 - 2nd interviews with board (executive session)

Selection Phase

Feb - Mar, 2020

- Board meeting (executive session)
 - Debrief "day in the district,"
 - 2nd interviews, ref. checks
 - Select new Superintendent

- Board negotiate contract with new Superintendent

- Announce selection of new superintendent

- Board meeting (public meeting - open session)
 - Formal contract offer to new Superintendent
 - Introduce new Superintendent

July 1, 2020

- Superintendent begins work

TBD, 2020

- Board/New Superintendent Development Workshop and Transition Plan

At the beginning of each superintendent search, a planning meeting determines the elements of the search to be included. However, a **typical search package** where the consultant takes the lead in all search activities might include the following services as a part of the Basic Fee.

- Facilitate multiple meetings by consultant with Board about

- Planning and search calendar
- Determining search criteria and candidate qualifications
- Search activity training
- Screening candidates
- Interviewing candidates
- Selection of next superintendent

- Community engagement to collect information for identifying search criteria and candidate qualifications with the following

- Focus groups and telephone interviews

- Community/Business leaders
- Administrators
- Teachers
- Classified staff
- Union leadership
- Student leaders

- Online questionnaire outreach

- Design and create online questionnaire
- Collect responses
- Organize and analyze responses for report to Board

- Consultant's reports about

- Results from online questionnaire
- Criteria and qualifications recommendations for Board
- Salary comparison information for Board's consideration
- Progress of advertising & recruiting

- Design and prepare search literature

- Electronic search brochure
- Electronic e-messages
- Notice of vacancy
- Application forms & materials

- Advertise position vacancy by posting on job placement websites (as approved by Board)
 - COSA, WASA, CASE (OR, WA, CO administrators) included in contract price
 - Other regional and national job boards as agreed with District

- Actively recruit prospective candidates by
 - Telephone calls
 - E-messages
 - Correspondence
 - Personal contact

- Collect and organize candidate application materials
 - Online applications
 - Electronic applications
 - Mail applications
 - Personal delivery applications

- Supervise & facilitate application screening process

- Training for Board and screening committee for:
 - Screening applications
 - Interviewing candidates
 - Reference checking

- Assist District organize for
 - Candidate interviews
 - A "day in the district" for finalists
 - Reference checks, site visits, and background checks

- Prepare “draft” press releases as needed to announce various search activities and ultimately selection of new superintendent

- Facilitate a follow up Transition Plan including up to 12 hours of Board development conducted by OSBA with Board and new Superintendent

1. What are the key elements in your process?

Answer: Key elements of our search process are:

- flexibility in the process
- stakeholder involvement to build support for the selection
- spending more time in the district than other search firms
- keeping the Board involved and informed at every step
- partnering with district to maximize use of available resources
- recruiting – not just advertising the position
- sticking with the search until we find the “right fit”
- working harder for your search than other consultants

2. How is your process different than other executive search firms?

Answer: The steps in a search process for most consultants are relatively similar. However, one important difference is our commitment to your search. We are not like a Costco of search consultants where volume counts. We are more of a boutique search firm specializing in customer service. We do not simply want to find a new superintendent. We want to help you find a difference-maker who is the right fit for your district.

3. Do you prepare and mail a print brochure advertising the vacancy?

Answer: Preparing a print brochure advertising the position and promoting the school district and community is just not current reality. We have the graphics design capacity to create a first quality electronic brochure instead. In the last few years no candidates have asked for a mailed print brochure. We prepare a colorful brochure about the position and the district suitable for electronic distribution and, if necessary, print a copy onrequest.

4. How do you recruit quality candidates for the position?

Answer: The range of advertising for a vacancy posting is a part of the planning process for each search. The vacancy will be posted in a traditional manner state-wide, regionally and nationally, as the Board chooses. We have multiple options for regional and national advertising. These traditional posting opportunities include multiple diversity group job placement websites to be sure minority candidates are aware of the vacancy. But, we do more.

In addition to posting widely, we directly notify superintendents and other administrators in Oregon, Washington, Idaho, Montana, Utah, Alaska, Nevada, Wyoming, Colorado, Arizona, New Mexico, Texas, California and other states about the vacancy by electronic message. We also send the electronic messages

to the faculties for colleges of education in the western U.S and other highly regarded colleges of education. The list of direct marketing groups grows each year. Currently, we have approximately 25,000 prospective candidates and other educators in our e-messaging data base. This approach puts the availability of the position directly in front of prospective candidates on their computer screens, tablets or smart phones. Because we use an e-marketing service for the vacancy announcements, the notification can be sent multiple times and will be sent at least twice during the application period.

Unlike some other search firms, we will also directly recruit candidates who might fit the profile the board seeks for its next superintendent. We network with superintendents about other qualified candidates who we will also contact. In other words, we work the phones and e-mails.

5. What involvement will District staff have in the search process? How much time will this take away from their other duties?

Answer:

The short answer is that the search process generally takes very little of the staff's time. The work of the search process is largely an activity for the Board, consultant and Board Secretary. Since the search for a superintendent often involves candidates who need confidentiality in the early stages, keeping the application process off-site with a consultant provides the candidates some comfort that their names will not be exposed prematurely to the existing staff. However, administrators and other staff or their representatives may be involved at various stages that might include:

- communications coordination
- implementing a marketing strategy
- interviews and focus groups for desired qualities and qualifications
- participation on a committee to screen applications
- observe candidate interviews
- accompany a finalist for a "day in the district"

6. What items are usually included in "costs and expenses" related to the search?

Answer:

The amount for costs and expenses the District can expect to spend (both District and consultant combined) varies depending on the scope of advertising, the geographic location of interview candidates, and the resources the District has available to assist with the search. However, as a "general rule" for most searches, the District can expect to spend an amount equal to no more than one-half the search fee for additional costs and expenses. However, in our experience the "costs and expenses" are frequently substantially less than the general rule usually not exceeding \$2,000-\$3,500 total even for larger districts.

Typical items of expense are:

Fees for advertising/posting of vacancy
Photocopy costs and supplies
Travel expenses (mileage, meals, lodging) for consultant
Interview candidate transportation and lodging costs

7. Describe the role of the School Board in the screening/selection process?

Answer: Ultimately, the Board makes the decision about who to interview after screening the applications. However, we strongly encourage the Board to seek the advice of a screening committee whose composition might include: administrators, other staff, and parent/community representatives. An effective screening committee size might be 15-18 others in addition to the Board members.

Usually, the Board members conduct the initial interviews. Sometimes, a few members of the screening committee are observers during the interview process. Observers do not ask questions - just observe. More eyes and ears during the interviews often results in a richer discussion by the Board when narrowing the field of interviewees to finalists.

8. How will our community and staff be involved in the search?

Answer: Community and staff engagement is a vital part of a successful superintendent search. Typically, we arrange a series of meetings with community groups, staff, students and others to explain the search process. At that meeting we also solicit suggestions and comments about the characteristics sought in the next superintendent. For those unable to attend one of the meetings, we provide an online survey with the same questions. We telephone interview local business and community leaders for the same purpose. This information is presented to the Board in a consultant's report to be used when deciding the qualities and profile characteristics sought for the new superintendent. Community members and staff will often also serve on the screening committee for applicants and participate as observers for interviews. When the finalist candidates are invited to the district for a "day in the district," the community and staff will have an opportunity to interact with the finalists and report their observations.

9. How do you take advantage of technology and social media to aid in the search?

Answer: We use electronic technology when it provides effective assistance in marketing the vacant position, contributes to finding the right fit, and is user-friendly. For example, we market the vacant position taking full advantage of a multi-media approach that includes online job postings, website information, online surveys, e-marketing and social networking. However, while we sometimes accept online applications from those candidates who choose that method, we also accept applications electronically in PDF format, traditional mail/UPS/FedEx, and personal delivery of a hard copy. In this respect we are candidate-friendly. For

some searches we set up an all-electronic application screening process allowing the application reviewers to do their work at their convenience. Note: this method requires extraordinary precautions to maintain confidentiality of application materials. While this method offers more convenience, we believe much of the value of screener interaction, discussion, and questions are lost in this method. Basically, we follow a technology rule of thumb that says, “use it if it works – otherwise don’t change just because it’s new technology.”

Section B

Firm Profile & Information



Steve Kelley (OSBA)

Steve Kelley joined the **Oregon School Boards Association (OSBA)** staff in July, 2015 as Director of Board Development. He is responsible for Board training and also leads the Executive Search team. Steve has 36 years of experience in public education, including six years as superintendent of the South Umpqua School District. His career includes stops in Florida, Wyoming and New Mexico, and the last 18 years in Oregon. Steve lives in Turner, Oregon (south of Salem).

Education

Education Leadership Certification/Coursework
University of North Florida
University of Oregon
Master of Arts – Adult Education
University of South Florida
Bachelor of Science - Secondary Education
Flagler College (graduated Cum Laude)

Education Employment

2015-present Director of Board Development – OSBA
2009-2015 Superintendent – South Umpqua SD
2001-2009 Assistant Superintendent – Lebanon Community SD
2000-2001 Founding Principal – East Mountain Charter HS, AlbuquerquePS (NM)
1998-2000 Middle School Principal – Uinta County SD (WY)
1995-1998 Middle School Principal/Asst. Principal – Nassau County SD (FL)
1982-1995 Teacher of math/science – Baker & Marion County SDs (FL)

Education & Community Service

Confederation of Oregon School Administrators
Oregon Association of School Executives
OASE Funding Coalition Subcommittee
Canyonville Lions Club “Educator of the Year” for 2012
Local service clubs including Chamber of Commerce and Elks



Sarah Herb (OSBA)

Sarah Herb joined the **Oregon School Boards Association (OSBA)** staff in 2016 bringing with her a background in vocational education and public service.

Sarah graduated with degrees in Natural Resources and Watershed Management from Oregon State University. She worked as a registrar and acting assistant to the campus president at two vocational colleges, working directly with students to ensure degree completion, as well as planning graduations and other events.

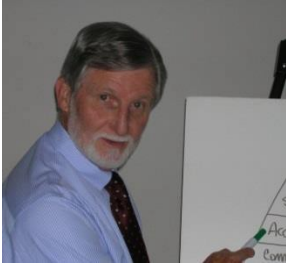
At OSBA, Sarah has assisted with over 20 superintendent searches and is the event planner for OSBA’s multiple major annual statewide conferences. She believes that selecting the right educational leader for a district is one of the most important functions of a school board and is passionate about supporting and facilitating that process.

Education

Bachelor of Science – Natural Resources, Watershed Management
Oregon State University

Education Employment

2018-present	Executive Search and Events Specialist– OSBA
2016-2018	Board Development Assistant– OSBA
2013-2014	Registrar–ITT Technical Institute
2010-2013	Registrar–Institute of Technology Salem



Greg McKenzie

Greg McKenzie, is an education consultant operating under the business name of *NextUp Leadership*, providing training, facilitation, executive search and assessment services for the education community and other local governments. He can say “been there - done that” adding a touch of real world experience to his services. Greg lives in West Linn, Oregon.

Education Board Service

2013- Present	OR Association of ESDs (OAESD) (Chair 2016, 2017)
2009- Present	Clackamas ESD board member (Chair, 2010-2012, 2017)
1987- 1995	West Linn-Wilsonville SD board member
1989- 1993	Oregon School Boards Association board member
1981- 1986	West Linn SD Budget Committee member

Employment

2008- Present	Education Consultant, <i>NextUp Leadership</i> Executive searches Board development training Facilitation
2002- 2008	Board Development – Oregon School Boards Assn. Leadership training Executive searches
1977- 2002	Business, property and litigation attorney

College Instructor

2006- 2013	Adjunct Professor, Lewis & Clark College Graduate School of Education and Counseling Models of Organizational Change
2001- 2005	Adjunct Professor, Embry-Riddle Aeronautical University Business Law & Ethics Aviation Insurance Aviation Law
1999-2002	Instructor, Clackamas Community College Real Estate Law
1992-1995	Instructor, Portland Community College Real Estate Law

Education

1977 Juris Doctor (JD), Northwestern School of Law – Lewis & Clark College
1968 Bachelor of Aerospace Engineering (BAE), Auburn University

Sample National Presentations

Iowa Association of School Boards Annual Conf. – “Managing Difficult Situations Successfully”
National School Boards Assn. Annual Conf. – “A Deeper Look at ... Leadership Skills for Dealing with Difficult People” (3 hr. workshop)
National School Boards Assn. Annual Conf. – "Essential Leadership Skills for Dealing with Difficulty People" (2 – 3 hr. workshops)
Illinois Assn. of School Boards Annual Conf. – (1) "Superintendent Evaluation: The Next Generation;" (2) "Transform Difficult People into 21st Century Leaders"
AESA Annual Conference – "Superintendent Evaluation: The Next Generation"
National School Boards Assn. Annual Conf. – “A Systematic Approach to Superintendent Evaluation, Goal Setting and Board Self-Assessment”
National Rural Education Assoc. – "Superintendent Evaluation: The Next Generation"
AESA Annual Conference – “Standards Based Superintendent Evaluation”
Illinois Assn. of School Boards Annual Conference – “From Difficult People to 21st Century Leaders”
Kentucky School Boards Assn. Leadership Institute – “From Difficult People to 21st Century Leaders”

Focusing on “whatever it takes” to move an organization to its next level of success, Greg helps diagnose problems and design a plan for improvement. Experienced as a facilitator, executive search consultant, leadership trainer, and lawyer, Greg brings a unique set of skills to his work. He has been involved with education for over 30 years. He has conducted over 150 chief executive officer and other school administrator searches with a belief that “finding the right fit” is the most important criteria. As a business attorney he has organized and advised hundreds of corporations, non-profits, trusts and partnerships. As a board development trainer, he has given hundreds of presentations and workshops for local, state and national organizations. As a facilitator he has assisted community groups, boards and staffs tackle the necessary planning to improve the performance of their organization and solve seemingly unsolvable problems.



Milt Dennison

Milt Dennison has 13 years of superintendent and administrator search experience in both Oregon and Washington. He also knows what it takes to be a successful superintendent having served as a K-12 superintendent in Washington, a K-6 superintendent in Oregon and an ESD superintendent. He brings valuable on-the-ground experience to the search team. Milt lives in Oregon City, Oregon.

Education

1980 Ed.D. Educational Administration and Curriculum, Univ. of Southern California
1975 M.A. Educational Administration, California State University, Sacramento
1970 B.A. Mathematics and Physical Education, Western State

College Education Employment

2016-2017 Interim Superintendent, Columbia Gorge ESD
2004-2016 Superintendent, Clackamas Education Service District
1993-2004 Superintendent, Camas School District (WA)
1986-1993 Superintendent, Canby Elementary School District
1984-1986 Director of Curriculum & Instruction, West Linn School District
1975-1984 Middle and Elementary School Principal

College Instructor

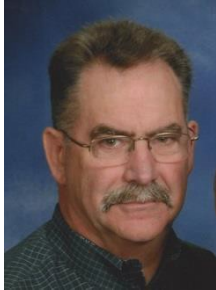
2011-2013 Adjunct Professor, University of Portland
Education Leadership Program
2006-2009 Adjunct Professor, Lewis & Clark College
Educational Leadership Doctoral Program
1986-1994 Adjunct Professor, Lewis & Clark College
Administrative Leadership, Community Relations

Education & Community Activities

Oregon Teacher Standards and Practices Commission (2007-13)
Oregon Association of Education Service Districts board member (Zone A Chair)
Cascade Council of the Boys Scouts of America board member (Senior Vice-President)
Washington State Association of School Administrators board member

Awards & Honors

American Association of School Administrators “Civic Star Award”
Camas-Washougal Chamber of Commerce “Citizen-of-the-Year”
Camas-Washougal Rotary Club “Rotarian-of-the-Year”
Washington Association of School Administrators “Award of Merit”



Mike Taylor

Mike Taylor has been superintendent for 3 different Oregon school districts: Riverdale SD; Parkrose SD; and Ontario SD spanning a period of 19 years. He also served as CEO for OBC-ACE Academy Charter School in East Multnomah County for 3 years. Mike has been an instructor at Concordia University, Graduate School of Educational Administration for several years. He was recognized as Educator of the Year by the Oregon Building Congress in 2007. Mike's superintendent experience has covered both urban and rural environments west of the mountains and east of the mountains. Mike lives in East Multnomah County, Oregon.

Education Experience

2013	Interim Superintendent Riverdale School District
2008 – 2011	Director ACE Academy (Charter School)
2007 – 2008	Education Consultant (Oregon Building Congress)
1999 – 2007	Superintendent Parkrose School District
1994 – 1999	Superintendent Ontario School District
1990 – 1994	Principal Ontario High School

College Instructor

2004 – Present	Adjunct Instructor Concordia University Graduate School of Educational Administration
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Education

1982	Oregon State University & Western Oregon State College Master's Degree in Counseling
1977	Western Oregon State College Master's Degree in Interdisciplinary Studies (Education, History, Economics)
1975	Oregon College of Education Bachelor of Science Degree in Secondary Education



“Cec” Amuchastegui

Cecelia “Cec” Amuchastegui is an education consultant whose current activities include serving as a Chalkboard CLASS Coach and Collaboration Grant Coordinator. Before becoming a consultant, she was Superintendent of Klamath Falls City Schools for 6 years. She also had a variety of other administrator positions in Klamath Falls. Cec lives in Klamath Falls, Oregon.

Education Experience

2011-Present	Chalkboard CLASS Coach; Collaboration Grant Coordinator
2004-10	Superintendent Klamath Falls City Schools
2000-04	Director of Secondary Education/School Improvement Klamath Falls City Schools
1991-95	Elementary Principal, Klamath Falls City Schools

Education

1981	MS in Education (Mental Retardation) – Oregon College of Education
1974	BS in Elementary Education – Oregon College of Education

Community Service

Board of Directors: United Way
SMART State Executive Program Committee
Board of Directors: Klamath Community College Foundation
Board of Directors: Pelican Foundation
Regional Board Member: Oregon Community Foundation

Oregon School Boards Association

Camas Valley SD – 2019 (Joint search with NextUp Leadership)

Rochelle Herberger, Board Chair – ylowmom@gmail.com; 541-430-0226

Don Wonsley, Superintendent – don.wonsley@camasvalley.k12.or.us; 541-445-2131

Days Creek SD – 2019 (Joint search with NextUp Leadership)

Troy Michaels, Board Chair – michaelsranch@frontier.com; 541-825-3760

Diane Swingley, Charter Board Chair - dswingley@citlink.net; 541-825-3352

Steve Woods, Superintendent – steve.woods@dayscreek.k12.or.us; 541-825-3296

Jefferson 14J SD – 2019 (Joint search with NextUp Leadership)

Kaye Jones, Board Chair – kaye.jones@jefferson.k12.or.us; 541-327-3514

Brad Capener, Superintendent – brad.capener@jefferson.k12.or.us; 541-327-3337

North Douglas SD – 2019 (Joint search with NextUp Leadership)

Tom Kelley, Board Chair – tdkelley@mydfn.net; 541-670-9427

Terry Bennett, Superintendent – terry.bennett@northdouglas.k12.or.us; 541-836-2223

Creswell SD – 2019 (Joint search with NextUp Leadership)

Mike Anderson, Board Chair – mikpen7@hotmail.com; 541-915-6286

Michael Johnson, Superintendent – mjohnson@creswell.k12.or.us; 541-895-6000

Cove SD – 2018 (Joint search with NextUp Leadership)

Steve McLean, Board Chair – stevemclean.dmd@gmail.com; 541-568-4256

Earl Pettit, Superintendent – earl.pettit@covesd.org; 541-568-4424

Klamath County SD – 2018 (Joint search with NextUp Leadership)

Denise Kandra, Board Chair – kandrad@kcsd.k12.or.us; 541-798-5123

Glen Szymoniak, Superintendent – szymoniakg@kcsd.k12.or.us; 541-883-5000

Mitchell SD – 2018 (Joint search with NextUp Leadership)

Miesha Bennett, Board Chair – alaskamlb@hotmail.com; 541-462-3022

Vince Swagerty, Superintendent – vswagerty@mitchell.k12.or.us; 541-462-3311

Oakridge SD – 2018 (Joint search with NextUp Leadership)

Tami Edmunds, Board Chair – tedmunds@oakridge.k12.or.us; 541-913-1600

Reta Doland, Superintendent – rdoland@ohswarriors.net; 541-782-2813

Reedsport SD – 2018 (Joint search with NextUp Leadership)

Jen Clark, Former Board Chair – jclark@reedsport.k12.or.us

Jon Zwemke, Superintendent – jzwemke@reedsport.k12.or.us; 541-271-3656

Forest Grove SD – 2018 (Joint search with NextUp Leadership)

Kate Grandusky, former Board Chair – kgrandusky@fgsd.k12.or.us; 503-359-5746

Valyrie Ingram, Board Chair – valyriewenzl@hotmail.com

Dave Parker, Superintendent, - 503-359-2427

North Marion 15 SD – 2017

Patrick McArthur, former Board Chair – Patrick.mcarthur@nmarion.k12.or.us;

Heidi Torian, Board Chair - heiditorian@yahoo.com

Ginger Redlinger, Superintendent – ginger.redlinger@nmarion.k12.or.us; 503- 678-7100

Jefferson County 509J SD – 2017

Laurie Danzuka, Board Chair – ldanzuka@509j.net

Ken Parshall, Superintendent – kparshall@509j.net; 541-475-6192

Pleasant Hill 1 SD - 2017

Wylda Cafferata, Board Chair – wyldac@gmail.com; 541-937-3114

Scott Linenburger, Superintendent. – slinenberger@pleasanthill.k12.or.us; 541-746-9646

NextUp Leadership

Central SD – 2017

Steve Love, Board Chair – 541-760-5028; slove@central.k12.or.us

Julie Sassor, Board Secretary – 503-606-2251

West Linn-Wilsonville SD - 2016

Keith Steele, Former Board Chair – 503-318-6867

Kathy Ludwig, Superintendent – 503-673-7034

Canby SD - 2015

Diane Downs, Former Board Chair – dkdowns@gmail.com

“Trip” Goodall, Superintendent – 503-266-7861

Centennial SD – 2017

Shar Giard, Board Chair - 503-666-7264

Connie Stewart, Executive Assistant - 503-760-7990

Dallas SD - 2015

Mike Blanchard, Board Chair – 503-510-4969

Michelle Johnstone, Superintendent - 503-623-5594

Coos Bay SD - 2016

James Martin – Board Member – 541-297-8115

Adrian DeLeon – Board Member - adriand@coos-bay.k12.or.us

Peggy Ahlgrim, Board Executive Secretary – 541-267-1310

Crook County SD - 2018

Doug Smith – Board Chair – 541-447-7004

Sara Johnson - Superintendent - 541-416-9962

Jan Martin – Board Secretary – 541-416-9963

OSBA

2019 (All jointly with NextUp Leadership)

Arco Iris Spanish Immersion School
Camas Valley SD
Creswell SD
Days Creek SD
Jefferson 14J SD
Newberg Public Schools
North Douglas SD
Roseburg Public Schools
Spray SD
Brookings Harbor SD (interim)
Dayton SD (interim)
Philomath SD (interim)
Silver Falls SD (interim)
Woodburn (interim)

2018

Cove SD Oakridge SD
Forest Grove SD (joint project)
Klamath County SD
Mitchell SD
Reedsport SD
South Lane SD
Days Creek SD (interim)
Jefferson SD (interim)
Wallowa SD (interim)

2017

Jefferson County SD 509J
North Marion SD
Pleasant Hill SD

NEXTUP LEADERSHIP

2018

Crook County SD
Tigard-Tualatin SD
Forest Grove SD (joint project)
Kelso SD (WA)
Churchill County SD (NV)
John Day SD
Burnt River SD
Nevada State High School (NV)
Tacoma PS (WA)
Scappoose SD

Riverdale SD
Nevada Assn of School Boards (NV)

NEXTUP LEADERSHIP (Cont'd)

2017

Ashland SD Paisley SD
Central SD Centennial
SD Pendleton SD
Prospect SD
Mosier Community School Tacoma
PS (WA)

2016

Clackamas ESD
Coos Bay SD
Pendleton SD
Port Orford-Langlois SD
Prospect SD
Reedsport SD
South Umpqua SD
Sutherlin SD
Knappa SD
West Linn-Wilsonville SD
Camas SD (WA)
Gladstone SD
OAESD

2015

Greater Albany SD
Dallas SD
Canby SD
Banks SD
Philomath SD
Brookings-Harbor SD
Roseburg SD
Knappa SD
Sisters SD

2014

Lincoln Co. SD
Perrydale SD
Fern Ridge SD
Monroe SD
Gervais SD
Three Rivers SD
Estacada SD

What Boards Have Said

“We might have thought, once our selection was made, the executive search process was over, but no, it was not. Impressively, it became clear that you wanted the board-superintendent relationship to get off on a good track and are eager to teach us processes to meet that goal. By helping us outline board expectations of the superintendent and superintendent expectations of the board, by helping us set priorities for the new superintendent’s first three months and my reviewing basic boardsmanship with us, we are on a far firmer footing than we would otherwise have been.”

Pleasant Hill School District
Enrollment: 1,000

“From the beginning, Greg’s expertise and flexibility served as a strong foundation to build a strong, customized search that was fiscally responsible, efficient and effective in attracting quality candidates for the position. Greg clearly understood the marketplace for Superintendents as well. He understood the importance of ensuring their confidentiality throughout the process- and was a true professional in standing firm to this practice.”

Hillsboro School District
Enrollment: 20,200

“I wish to thank you for facilitating a flawless superintendent search for the Philomath SD. The process was thorough, methodical, and well organized. It made the administrative effort for the School Board as minimal as possible while creating excellent community engagement. Most notably, by all measures it created an excellent result.”

Philomath School District
Enrollment: 1,700

"Everything – from beginning to end of the search was done well. Communication was great. Kept the Board Secretary and Board Chair well informed throughout the entire search process. Consultant availability for questions and quick response were excellent. Greg is truly a professional who is very knowledgeable, detail oriented, and awesome to work with. Greg knows how to be diplomatic but yet get the point across and bring the many different personalities of board members together."

Fern Ridge School District
Enrollment: 1,800

What Candidates Have Said

“After the extensive hiring process, I believe the board knows more about me than I know myself.”

New Superintendent
2017

“Thanks for your honesty. Among search consultants with whom I have worked you are clearly in the top tier. Please do keep me in mind for other openings you’re handling. I enjoyed working with you also. You may not be aware of how unique your responsiveness is.”

Nick F., Fall River, MA

Section C

Fee Structure

PRICING

Executive/Superintendent Search Services

Basic Contract Fee: \$12,500 includes:

Scope of Work services described in Contract for Services
Basic job vacancy advertising package

Reimbursable Costs & Expenses: (actual costs)

National advertising on online job boards (when agreed by District)
Mileage to & from District for meetings (462 miles x 5 estimated round trips x 0.58 IRS rate= **\$1,339.80**)
Lodging for overnight in-district visits (estimated 7 nights at \$150/night = **\$1,050**)
Meals while in-district for search activities (estimated 14 meals at \$25/meal = **\$350**)

Estimated Total: \$12,500 + \$1,339.80 + \$350 = **\$14,189.80**

Guarantee: If for any reason within the first 2 years following appointment, the selected candidate departs the position, OSBA and NextUp Leadership will assist in selecting a replacement without additional cost to the Basic Contract Fee, so long as the Scope of Work remains the same and the District has followed the recommendations of Consultants to complete the search process as outlined herein including the follow up Transition Plan.

Proposer Signature:

Signature	Director of Board Development & Executive Searches
Oregon School Boards Association	Title
Company	Date
1201 Court St NE, Suite 400	Sept 5, 2019
Street Address	Date
503-588-2800	Salem, OR 97302
Phone	City/State/Zip
skelley@osba.org	503-588-2813
Email address	Fax

SAMPLE SEARCH CONTRACT FOR SERVICES

Parties: **A. Gregory McKenzie (“Contractor”)**
Window to Leadership, an Oregon Limited Liability Company
dba **NextUp Leadership (NextUp)**
1470 Rosemont Road
West Linn, Oregon 97068

Oregon School Boards Association (OSBA) (“Contractor”)
An Oregon Non-Profit Corporation
1201 Court St., NE, Suite 400
Salem, Oregon 97301

Eagle Point School District (“District”)
Po Box 548
Eagle Point, Oregon 97524-0548

1. **Services. Contractors** mutually agree between themselves and together agree to provide Executive Search professional services to the **District**.

2. **Scope of Work.** The scope of the services provided by Contractors will include search consulting, facilitating, recruiting and transition services associated with a superintendent search with the position beginning work on July 1, 2020, including:
 - Attending meetings with the Board, staff, students, and community groups as necessary to carry out the search plan.
 - Working with the District leadership to establish a search calendar, facilitate meetings with Board, staff, students and community members to establish candidate qualities and qualifications, and establish a process to be used by any in-district candidates.
 - Preparing and distributing search forms and promotional material needed for collecting applications and advertising the vacancy both within the State of Oregon as well as regionally and nationally as agreed with the District.
 - Managing candidate applications and information; assist with screening applications; assist with organizing interviews; provide Board members with guidelines for interviews and reference checks; conduct reference checks at the Board’s request; organizing site visits when requested; and keeping applicants informed of their status during the search process.
 - Conducting a series of board/superintendent workshops (up to 12 hours of professional development conducted by OSBA) to create and execute a Transition Plan for establishing a solid foundation for the new leadership team over the first six (6) months of the new superintendent’s contract.

3. **Term.** The term of this Agreement shall begin on **October 1, 2019**, and continue until:
 completion of Scope of Work outlined above
 ending date of _____

4. **Basic Fee for Services.** District will pay a basic fee for Contractor services as follows:
 flat fee up to, but not exceeding **\$12,500.00**
 hourly rate of \$165/hr. for professional time
 hourly rate of \$70/hr. clerical support services

SAMPLE SEARCH CONTRACT FOR SERVICES

5. **Expenses.** District will reimburse Contractors for Contractors' expenses incurred while providing services on the basis of actual expenses incurred including:
- mileage (at the federal rate)
 - lodging
 - meals
 - photocopying, supplies, printing, postage & shipping costs
 - air transportation
 - ground transportation (rental car)
 - advertising/posting fees beyond basic package as agreed by District
6. **Terms for Payment.** OSBA will provide fiscal services for the performance of this Agreement. District agrees to pay billings within 30 days after invoice on the following schedule:
- One-half of the Basic Fee (\$6,250.00) upon execution of this agreement.
 - The remaining one-half of the Basic Fee (\$6,250.00) plus all applicable expenses incurred in Section 5 above will be invoiced when the search is concluded.
7. **Independent Contractor Status.**
- A. Each Contractor is an independent contractor. This Agreement shall not be construed to establish an employer-employee relationship between the District and the Contractors, including subcontractors or employees thereof. Contractors are free to contract with other parties on other matters. Contractors will not receive any benefits normally accruing to District employees unless required by applicable law.
 - B. The manner of providing these services are under sole control of Contractors, including providing all tools and equipment necessary for the performance of these services. The services provided must, however, meet the general approval of the District and shall be subject to the District's general right of inspection and supervision in order to secure satisfactory performance.
 - C. Contractors, in carrying out the services provided under this Agreement, are not employees of District, and as such accept full responsibility for any taxes or other obligations associated with payment for services under this Agreement.
 - D. None of the services covered by this Agreement shall be subcontracted without prior written consent of the District. Contractors shall be fully responsible to the District for all acts and omissions of any subcontractor, employee, agent or servant, whether employed directly or indirectly by Contractors. **Steve Kelley (OSBA), Sarah Herb (OSBA), Greg McKenzie, Mike Taylor, and Milt Dennison (NextUp)** may provide primary consulting services to District for this search.
8. **Worker's Compensation.** Contractors shall comply with state worker's compensation law for all employees who work under the terms of this Agreement. If Contractors hire employees, they shall provide District with certification of Workers' Compensation Insurance, with employee's liability in the minimum of \$100,000 upon request by District.
9. **Termination of Agreement.** This Agreement may be terminated under the following conditions:
- A. By written mutual agreement of all parties and may be immediate.
 - B. Upon ten (10) calendar days written notice by any party to the other.
 - C. Immediately on breach of contract.
 - D. Upon expiration of the term specified above.
- If this Agreement is terminated prior to the expiration date, District shall pay Contractor for services provided prior to the termination.

SAMPLE SEARCH CONTRACT FOR SERVICES

10. **Standard of Services.** Contractors agree to perform services with a standard of care, skill and diligence normally provided by a professional individual in the performance of similar services. It is understood that Contractors must perform the services based in part on information furnished by District and that Contractors shall be entitled to rely on such information. Contractors agree that the recommendations, guidance and performance of any person assigned under this Agreement shall be in accordance with professional standards and the requirements of this Agreement. District agrees not to take any action which will adversely interfere with Contractors' ability to perform to this standard.

11. **Guarantee.** Provided the District follows the steps outlined in the search process proposed by Contractors, but a new chief executive officer is not hired, or if the new chief executive officer leaves for any reason prior to completing two (2) years of service and the District has followed the Transition Plan proposed by OSBA, Contractors will conduct a new search for the cost of expenses only.

12. **Written Notice.** Any notice of termination or other communication having a material effect on the performance of this Agreement shall be served by U.S. Mail or by confirmed e-mail delivery on the signatories listed below at the addresses listed above.

It is agreed. Date: Sept 5, 2019

OREGON SCHOOL BOARDS ASSOCIATION (Contractor)



Steve Kelley, Director of Board Development and Executive Searches

It is agreed. Date: Sept 5, 2019

WINDOW TO LEADERSHIP, LLC (Contractor)
(dba NextUp Leadership)



A. Gregory McKenzie, President

It is agreed. Date: _____

EAGLE POINT SCHOOL DISTRICT (District)

Dan Hodges, Board Chair

4.B. Selection of Superintendent Search Consultant

Presenter: Mr. Hodges

5. Adjournment

6. Call to Order

7. Roll Call

8. Pledge of Allegiance

Presenter: Mr. Hodges

9. Superintendent Search

Presenter: Mr. Hodges

9.A. Interviews

A Proposal to the Eagle Point School Board for a Superintendent Search



EAGLE POINT
— **SCHOOL DISTRICT 9** —
Every Student - Every Class - Every Day!

Human Capital Enterprises believes it uniquely has the expertise to support the Eagle Point School District through its upcoming leadership transition. As a leading Oregon Superintendent Search Firm, we pride ourselves on searches conducted with exceptional service to our Boards and widely respected attention to detail – with the highest level of integrity in the process. Our deep local ties combined with our connection to the national community allows us to bring the best candidates to the Eagle Point Board from across Oregon, the rest of the Pacific Northwest, and throughout the country. We encourage you to contact our recent clients and would be delighted to visit with you in person to discuss how we might serve you exceptionally well.

Respectfully Submitted for Consideration,
August 29, 2019



HUMAN CAPITAL ENTERPRISES
REDEFINING HUMAN RESOURCES LEADERSHIP

Hank Harris, President of Human Capital Enterprises (HCE), proposes to conduct a search for an outstanding and highly qualified Superintendent of Schools for the Eagle Point School District. Human Capital Enterprises is a small sole proprietorship owned and operated by Hank Harris, who is well-versed in this work, well-known in the Pacific Northwest and who has built a strong nationwide reputation for professionalism and expertise in public school district leadership searches. For Superintendent Searches, Hank Harris co-brands his searches with the national superintendent search firm Hazard Young Attea & Associates, (hyasearch.com.) Throughout this proposal, the HCE acronym is also used to refer to the HCE/Hazard Young & Attea partnership.

Hank has worked as a search consultant as well as a Board and Superintendent consultant to several districts around the region, some of which include:

Oregon

- Ashland
- **Beaverton**
- Brookings
- Central Point
- Eugene
- Forest Grove
- **Greater Albany**
- Hermiston
- **Lebanon**
- Lincoln County
- **Linn-Benton-Lincoln ESD**
- **Medford**
- **North Clackamas**
- Northwest Regional ESD
- **Portland Public**
- Sherwood
- South Coast ESD
- Willamette ESD

Washington

- Bellingham
- **Central Kitsap**
- Marysville
- North Central ESD
- Olympia
- **Richland**
- Spokane
- **Wenatchee**

Outside of the Pacific Northwest

- Fairfax County, Virginia
- Fulton County, Georgia
- Henrico County, Virginia
- Portsmouth, Virginia
- **Prince George's County, Maryland**
- **Richmond, Virginia**
- Stevens Point, Wisconsin

All Districts in bold above represent Districts where a Superintendent or Assistant/Deputy Superintendent Search took place. We wholeheartedly encourage you to contact as many of our clients as possible to learn first-hand about the Human Capital Enterprises difference. A number of them are listed below.

District Name	Board Liaison	Phone
Beaverton School District (OR)	Anne Bryan	503.679.5040
Central Kitsap School District (WA)	Jeanne Schulze	360.908.5001
Greater Albany Public Schools (OR)	Jennifer Ward	541.730.2270
Medford School District (OR)	Cynthia Wright Suzanne Messer	541.778.6599 541.941.2924
Portland Public Schools (OR)	Amy Kohnstamm	503.913.3945
Richland School District (WA)	Rick Jansons	509.528.3488

Hank’s resume is attached. Hank has been in private practice since 2011, specializing in leadership selection in public school districts in the Pacific Northwest. He has been instrumental in finding outstanding educational leaders at the Superintendent and Cabinet level since 2012. His success rate is very strong, in that 90% of all Oregon and Washington Superintendents and Deputy/Assistant Superintendents who have been placed as a result of a search that Hank has led are still leading their respective districts.

Prior to opening Human Capital Enterprises, Hank was a teacher, principal, and central office leader in Oregon, Washington, and California. He served as Executive Director of Human Resources for Canby School District and for Portland Public Schools in Oregon and held the same role in Bellingham School District in Washington before entering private practice. He also served on the governing board of the American Association of School Personnel Administrators, and was their Interim Executive Director for a period of time in early 2014.

Both HCE and HYA envision certain milestones for this work with the Eagle Point School Board, on a clear timeline that has been pre-approved by the members of the Board. The work of the search can be delineated as follows.

1. PLANNING

Hank works closely with the Board to establish parameters and a framework for the search. Hank will develop a strong communication plan with the Board that meets the needs of the Board collectively and individually.

2. POSTING AND ENGAGING.

Care is taken to post the position in the appropriate venues for the kind of search that the Board desires. Hank will also spend time in the Eagle Point area, getting to know the community by engaging with key stakeholders and conducting focus groups. Following this high-level engagement, Hank will present to the Board a draft “Ideal Profile” for the Board to consider.

3. RECRUITING

The ability to attract candidates who may not be actively searching for a leadership role is a key hallmark of the HCE approach. Hank’s direct email announcements are widely known by Washington and Oregon school leaders as well as nationwide – and they reach an audience of over 11,000 educational stakeholders across the country. Hank reaches out to talented individuals throughout the region who reflect the profile of the ideal Eagle Point superintendent candidate, in order to entice talented individuals who might not otherwise know about the vacancy in Eagle Point. Similarly, there are candidates who might know of the Eagle Point vacancy but may not recognize that it is an ideal opportunity for them to consider. Those are the very individuals Hank will identify and approach.

4. SELECTION

Hank will engage in multiple conversations with top prospects including a preliminary interview and preliminary reference check. Top candidates will be recommended to the Board in an Executive Session, at which time the Board will determine whom to invite for first-round interviews. Although Hank will articulate a rationale regarding each recommended and non-recommended candidate, the Board may decide to interview any candidates that it selects.

There are several options for the Board to consider in determining a selection process and timeline, and these will be provided – as well as advantages and disadvantages of each. Consistent throughout will be an extremely high level of communication and professionalism. Board Members as well as Candidates will feel a respectfulness and care that is the hallmark of HCE.

5. TRANSITION

Hank will guide the Board through the finalization process, which includes the public announcement and an optional but recommended, comprehensive background check.

6. FEE FOR SERVICE

Consultant Fee is \$24,800. This includes all management and coordination of the search and includes up to 10.5 days on site, which is typically an adequate amount of days onsite for a search in a school district the size of Eagle Point.

- Planning Session with Board
- Three Consultant Days of Focus Groups and Board and Community Interviews
- Ideal Profile Meeting with Board
- Slate Meeting
- First-Round Interviews
- Three Days of Second-Round Interviews followed by a morning Selection Meeting.
- Upon request, additional days on site available for expanded search work or Board coaching.

HCE recognizes the challenges of Oregon school budgets, and therefore recommends only the following additional items for the Board to carefully consider.

- a. Candidate travel reimbursement.
 - HCE recommends the District reimburse out of town candidates for travel to Eagle Point for in-person interviews.
- b. Consultant travel reimbursement.
 - To ease travel expenses for the school district, Hank is physically based on the west coast from November through April.
- c. Advertising.
 - i. Advertising is determined in conversation with the Board.
 - ii. Hank's listserv reaches over 11,000 individuals who are identified as education leaders or education stakeholders. A listserv blast is included at no extra charge.
 - iii. COSA is free to Oregon school districts who have an active membership.
WASA/WSSDA/WSPA in Washington state is recommended at reduced or no fee when posted directly by the District.
 - iv. National advertising packages are available through HYA.

- d. Comprehensive Background Check
 - HCE Engages with a third-party to conduct an optional comprehensive background check on selected finalist(s). Rates run between \$1100-1950 with an average of ten-day turnaround.

7. GUARANTEE

- a. The Superintendent appointed will not be presented to another Board as a candidate if it would result in the Superintendent leaving Eagle Point within three years of employment.
- b. If the Superintendent departs from the position during the first year under any circumstances or within two years if a majority of the Board by vote 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.

On behalf of Human Capital Enterprises and Hazard Young Attea and Associates, I thank you for your consideration.

*Hank Harris
President, Human Capital Enterprises
Senior Associate, Hazard Young Attea and Associates*

A Proposal for the Selection of a Superintendent

Presented To:



Eagle Point School District 9

Every Student. Every Class. Every Day

Submitted By:

Ray and Associates, Inc.

**CORPORATE OFFICE
901 17TH STREET NE
P.O. Box 10045
CEDAR RAPIDS, IOWA 52402
PHONE: 319-393-3115
FAX: 319-393-6911
E-mail: glr@rayassoc.com
Website: www.rayassoc.com**

**WASHINGTON OFFICE
1202 N. 10TH PLACE, #1106
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Finding Leaders for America's Schools

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The logo features the letters 'R' and 'A' in a large, stylized, light blue font. The word 'and' is written in a smaller, dark blue font between the 'R' and 'A'. Below this, the company name 'Ray and Associates, Inc.' is written in a dark blue, serif font. Underneath the company name, the tagline 'Leaders in Executive Searches' is written in a smaller, dark blue, italicized serif font.

Ray and Associates, Inc.
Leaders in Executive Searches

August 29, 2019

Eagle Point School District 9
ATTN: Mr. Dan Hodges, Board Chair
11 N Royal Avenue
Eagle Point, OR 97524

Dear Mr. Hodges and Members of the Board of Directors:

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 Oregon as we have completed successful Superintendent searches for Hood River County School District, Lake Oswego School District, Gresham-Barlow School District, Salem-Keizer Public Schools, Eugene School District 4J and Medford School District 549C, Oregon. In the Western region we have conducted Superintendent searches for Everett Public Schools, Granite Falls School District, Lake Washington School District, Snoqualmie Valley School District, Seattle Public Schools, Mercer Island School District, Bellevue School District, Northshore School District, Kent School District and Federal Way Public Schools, Washington; Colorado School for the Deaf and the Blind, Colorado Springs School District 11, Sheridan School District No. 2, Boulder Valley School District, Douglas County School District, Jeffco Public Schools and Eagle County Schools, Colorado; Clark County School District, Nye County School District and Lander County School District, Nevada; Blaine County School District, Idaho; Palos Verdes Peninsula Unified School District, Poway Unified School District, San Ysidro School District, Santa Clara County Office of Education, Albany USD, Berkeley USD, Pasadena USD, Sacramento City USD, East Side Union HS District and Emery USD, California; Missoula County Public Schools, Montana; Los Alamos Public Schools, Albuquerque Public Schools, Santa Fe Public Schools and Roswell Independent School District, New Mexico; Paradise Valley Unified School District, Deer Valley Unified School District, Roosevelt Elementary School District, Gilbert Public Schools, Camelback Desert Sands, Tempe Union High School District and Cartwright Elementary School District, Arizona; and Hawaii School of Deaf and Blind, Hawaii.

Nationally we have assisted Waterbury Public Schools, Greenwich Public Schools, Bridgeport Public Schools, Hartford City Public Schools and the Consolidated School District of New Britain, Connecticut; Wyandanch Union Free School District and Amityville Union Free School District, New York; Baltimore County Public Schools, Anne Arundel County Public Schools, Howard County Public School System,

Wicomico County Public Schools and Prince George's County Public Schools, Maryland; Woodland Hills School District, Lewisburg Area School District, Wissahickon School District, Millville School District, Montgomery County Intermediate Unit 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; Dover School District, New Hampshire; Tangipahoa Parish School System, Louisiana; Lynchburg City Schools, Montgomery County Public Schools, Mecklenburg County Schools, Bedford County Schools, Newport News Public Schools, Hampton City Schools, Prince William County Public Schools and Williamsburg-James City Schools, Virginia; Savannah-Chatham County Public School System, Georgia; Maury County Public Schools, Knox County Schools, Oak Ridge Schools and Sumner County Schools, Tennessee; Pulaski County Special School District, Rogers Public Schools, Cotter Public Schools, Mountain Home Public Schools and Fayetteville Public Schools, Arkansas; The School District of Palm Beach County, Florida State University Schools, Brevard Public Schools and Collier County Public Schools, Florida; 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; Cleveland Heights-University Heights City School District, Shaker Heights City Schools, Cincinnati Public Schools and Lorain City Schools, Ohio; Omaha Public Schools and Westside Community Schools, Nebraska; Lakeville Area School District, Minnesota; Dickinson Public Schools, Williston Public School District 1 and Fargo Public Schools, North Dakota; Vermillion School District, South Dakota; Detroit Public Schools Community District, Ecorse Public Schools, Benton Harbor Area Schools and Ann Arbor Public Schools, Michigan; Geary County Schools USD 475, Shawnee Mission School District, Lawrence Public Schools and Kansas City Kansas Public Schools, Kansas; Joplin Schools and Kansas City Public Schools, Missouri; Butler School District 53, Rock Island-Milan School District #41, Hazel Crest School District 152½, Glenbrook North and Glenbrook South High Schools, Joliet School District and Township School District #113, Illinois in their educational leadership searches.

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

We are currently assisting Bloomfield Hills Schools, Michigan; Indian Prairie School District 204 and Orland School District 135, Illinois; Marion County Public Schools and Hillsborough County Public Schools, Florida; Hawaii State Department of Education, Hawaii; and 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 (40) 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 over one hundred sixty (160) 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 "R.M. Ray". The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Ryan M. Ray
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 Eagle Point School District 9 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 a National Executive Director, eight (8) Regional Search Directors and over one hundred sixty (160) 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 (40) 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 Oregon as we have completed successful Superintendent searches for Hood River County School District, Lake Oswego School District, Gresham-Barlow School District, Salem-Keizer Public Schools, Eugene School District 4J and Medford School District 549C, Oregon. In the Western region we have conducted Superintendent searches for Everett Public Schools, Granite Falls School District, Lake Washington School District, Snoqualmie Valley School District, Seattle Public Schools, Mercer Island School District, Bellevue School District, Northshore School District, Kent School District and Federal Way Public Schools, Washington; Colorado School for the Deaf and the Blind, Colorado Springs School District 11, Sheridan School District No. 2, Boulder Valley School District, Douglas County School District, Jeffco Public Schools and Eagle County Schools, Colorado; Clark County School District, Nye County School District and Lander County School District, Nevada; Blaine County School District, Idaho; Palos Verdes Peninsula Unified School District, Poway Unified School District, San Ysidro School District, Santa Clara County Office of Education, Albany USD, Berkeley USD, Pasadena USD, Sacramento City USD, East Side Union HS District and Emery USD, California; Missoula County Public Schools, Montana; Los Alamos Public Schools, Albuquerque Public Schools, Santa Fe Public Schools and Roswell Independent School District, New Mexico; Paradise Valley Unified School District, Deer Valley Unified School District, Roosevelt Elementary School District, Gilbert Public Schools, Camelback Desert Sands, Tempe Union High School District and Cartwright Elementary School District, Arizona; and Hawaii School of Deaf and Blind, Hawaii. 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 Eagle Point School District 9. 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 Eagle Point School District 9. In addition, we have professional contacts throughout Oregon, the western 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. Ryan M. Ray, President

Cedar Rapids, IA

Ryan is President of Ray and Associates, Inc. He supervises and oversees all searches conducted by the firm and will directly interact with the Eagle Point School District 9 and any committee that may be established on all details of this search. He has an earned Master's degree from Lindenwood University in St. Louis and a Bachelor's degree from the University of Missouri in Columbia, Missouri.

Dr. James Hager

Regional Search Director

Renton, WA

Jim serves our firm as a Regional Search Director and will monitor and direct search team efforts as well as recruiting and screening candidates. Dr. Hager received his Bachelor of Science Degree in Science from St. Benedict's College in Atchison, Kansas; a Master of Science Degree in Educational Administration from Kansas State University, Manhattan, Kansas; and a Doctor of Philosophy Degree in Educational Administration and Curriculum from the University of Iowa, Iowa City, Iowa. Jim has served in the education for over 30+ years.

Mr. Robert Neu

Regional Search Associate

Enumclaw, WA

Rob serves our firm as a Regional Search Associate and will monitor and direct search team efforts as well as recruiting and screening candidates. Mr. Neu received a Bachelor of Science degree in Business Education from Eastern Michigan University; a Master of Arts degree in Secondary School Administration from Central Michigan University and his Educational Specialist degree from Oakland University in Michigan. Rob has 30+ years in the education field having served as a teacher, Assistant Principal, Principal, Director of Secondary Education and Superintendent.

SUMMARY OF PROJECT ASSOCIATES

Dr. Roy Brooks
Little Rock, AR

Mr. Dale Caldwell
New Brunswick, NJ

Mr. Rick Mills
Chicago, IL

Dr. Gloria Davis
Chicago, IL

Dr. Darlene Schottle
Big Fork, MT

Dr. James Davis
Plano, TX

Mr. Ricardo Medina
Bridgeport, MI

Dr. Brenda Dietrich
Topeka, KS

Dr. Mary Fasbender
St. Charles, IL

Mr. Dale Monroe
Marion, IA

Mr. Don Long
Hendersonville, TN

Mr. Michael Collins
Columbus, OH

Dr. Paige Fenton-Hughes
Douglas, WY

Ms. Sandi Gero
Rock Hill, SC

Dr. Carl Davis
Powder Springs, GA

Mr. Robert Alfaro
Hutto, TX

Dr. Ann Schultz
Westminster, CO

Dr. Bob Hammon
Sycamore, IL

Mr. Alvin Johnson
Sandy Springs, GA

Dr. Michael Rush
Lakewood, NJ

Dr. Bob Mata
Cathedral City, CA

Dr. Tom Williams
Scottsdale, AZ

Dr. Lane Plugge
Council Bluffs, IA

Dr. Mary Ronan
Cincinnati, OH

Dr. Richard Christie
Council Bluffs, IA

Dr. Karen Stinson
Platteville, WI

Other associates throughout the country will be actively recruiting, screening, and investigating finalist candidates.

SECTION I

CONSULTANT SERVICES PROVIDED FOR EAGLE POINT SCHOOL DISTRICT 9 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 Eagle Point School District 9.
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 Eagle Point School District 9 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 Skype, 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'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 Confederation of Oregon School Administrators and Oregon 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 Eagle Point School District 9 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 Eagle Point School District 9.

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.

EAGLE POINT SCHOOL DISTRICT 9

SUPERINTENDENT SEARCH *SUGGESTED* PROCESS AND TIMELINE

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

DATE

<p>Stage 1 Board Input & Preparation</p>	<p>_____ Consultant planning meeting with the Board and individual Board member interviews. <i>(Time: TBD)</i> (option to conduct via Skype, 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>
<p>Stage 2 Profile Development & Process</p>	<p>_____ Online survey link, for input on developing the profile, available on District website from _____ to _____.</p> <p>_____ Meetings with constituent and stakeholder group representatives.</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>_____ Board to finalize Superintendent profile for the promotional flyer and online application form. <i>(Time: TBD)</i> (option to conduct via Skype, conference call or gotomeetings.com)</p>
<p>Stage 3 Recruiting & Screening</p>	<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>
<p>Stage 4 Candidate Presentation</p>	<p>_____ 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. <i>(Time: TBD)</i></p> <p>_____ Interview candidates (1st round).</p> <p>_____ Meeting with consultant following the last interview. <i>(Time: TBD)</i></p>
<p>Stage 5 Selection of Finalist & Future Planning</p>	<p>_____ Interview finalist candidates (2nd round). <i>(Optional)</i></p> <p>_____ Final meeting with consultant following the last interview. <i>(Time: TBD)</i> (option to conduct via Skype, 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 160 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 Eagle Point School District 9 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 sixteen thousand five hundred dollars (\$16,500.00). 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 Skype, 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 1st round candidate interviews via Skype 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: EAGLE POINT SCHOOL DISTRICT 9

Ray and Associates, Inc. will spend as much time as needed to conduct a successful search for Eagle Point School District 9. 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	1,500.00
Ground transportation (billed at \$0.58 per mile)	200.00
Hotel (if needed for stakeholder meetings)	400.00
Meals	150.00
** Travel Subtotal.....	2,250.00

****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:2,750.00
Ray and Associates, Inc. Base Fee16,500.00

***ESTIMATED SEARCH COST \$19,250.00**

***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. Eagle Point School District 9 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 how extensive the need as determined by Eagle Point School District 9. 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.

SECTION IV

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 Skype.

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 Eagle Point School District 9. If Eagle Point School District 9 or Ray and Associates, Inc. terminate this agreement, Eagle Point School District 9 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
Everett Public Schools Jim Hager worked this search	Everett, WA	Caroline Mason	Board Member	Cell: 425-238-7308 caroline.mason@everettsd.org
Lake Oswego School District Jim Hager worked this search	Lake Oswego, OR	Liz Hartman	Board Member	Cell: 503-697-7727 liz.hartman@loswego.k12.or.us
Lake Washington School District Jim Hager worked this search	Lake Washington, WA	Siri Bliesner	Board President	District Number: 425-936-1257 sbliesner@lwsd.org
Westside Community Schools	Omaha, NE	Adam Yale	Board Member	Cell: 402-672-2294 yale.adam@westside66.net
Woodland Hills School District	North Braddock, PA	Jamie Glasser	Board President	Cell: 412-874-0161 glasja@whsd.net
Tangipahoa Parish School System	Amite, LA	Therese Domiano	Former Board President	Cell: 985-974-2955
Lawrence Public Schools	Lawrence, KS	Shannon Kimball	Former Board President	Cell: 785-840-7722 skimball@usd497.org
Pittsburg Community Schools USD 250	Pittsburg, KS	Marlene Willis	Former Board President	Cell: 602-404-8835 mwillis@usd250.org

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

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.

A Proposal Prepared for

***Eagle Point
School District 9
Eagle Point, Oregon***

for

*The Search and Selection of a
Superintendent of Schools*

submitted by

MCPHERSON *MJ* JACOBSON, LLC

EXECUTIVE RECRUITMENT & DEVELOPMENT



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Omaha, Nebraska 68144
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Website: www.macnjake.com



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September 4, 2019

Board of Directors
Eagle Point School District 9
11 N. Royal Ave
Eagle Point, Oregon 97524

Thank you for the opportunity to respond to your RFP. The enclosed proposal describes the professional services McPherson & Jacobson, L.L.C. will provide Eagle Point School District 9 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 stakeholder groups you identify, will implement a systematic, comprehensive process culminating in the hiring of the most qualified candidate for your district.

With over 100 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

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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09/19

The McPherson & Jacobson Difference

“It’s About the Kids”

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

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

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

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

Leading National Search Firm

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 725 superintendents** and other officials in public and non-profit organizations across the United States. **McPherson & Jacobson is one of the leading national superintendent search firms.**

Nationwide Network of Experienced Consultants

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

Sustainability in Leadership

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

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

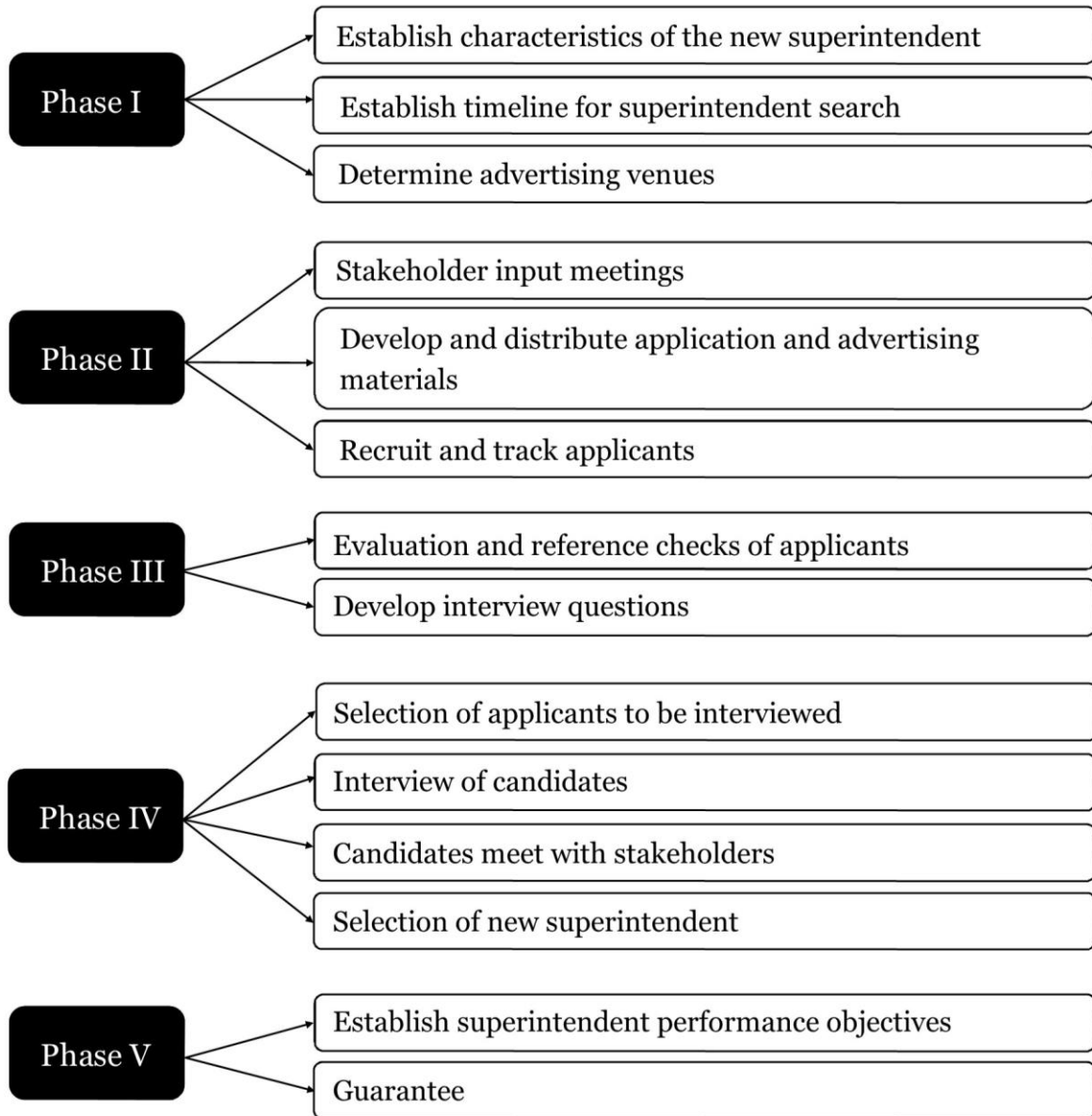
Executive Summary

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

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

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

Five Phases of a Superintendent Search



Phase I

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

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

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

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

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

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

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

✓ **Identify appropriate stakeholder groups.**

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

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

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

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

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

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

Phase II

In Phase II McPherson & Jacobson's consultants will:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

- ✓ **Confidentiality of Applicants**

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

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

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

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

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

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

Phase III

In Phase III McPherson & Jacobson's consultants will:

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

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

✓ **Conduct reference checks.**

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

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

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

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

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

Priscilla Cox, Elk Grove Unified School District, CA

"Promptness, excellent candidate selection, timely service and professional manner" (what board member liked about the service)

Kevin West, Arkansas Arts Academy, Rogers, AR

Phase IV

In Phase IV McPherson & Jacobson's consultants will:

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

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

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

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

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

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

- ✓ **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

In Phase V McPherson & Jacobson's consultants will:

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

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

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

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

✓ **Provide a guarantee.**

If the board chooses to use our complete service, we will guarantee our process 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.

"I am sure our Board would look to McPherson & Jacobson again the next time we are looking for a superintendent."

John Rice, Twin River Public Schools, Genoa, NE

Timeline

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

Search sequence:

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

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

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

- After the closing date
 - All the completed applicant files are forwarded to the consultants
 - The consultants begin the review and pre-interview process

- Approximately two to four weeks after the closing date
 - Consultants provide information to the board on all applicants who completed the process
 - Consultants present summary profiles 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
 - 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

Consultants for Search

Julian Diaz

1481 Hammon Avenue

Oroville, CA 95966

Email: j_diaz@macnjake.com

Phone: 530-680-3880

Educational Background

M.S.A.	2013	National University	Administration
Clear Admin. Service Cred. II	1995	California State University-Sacramento	Ed. Admin.
Prelim. Admin. Service Cred. I	1990	California State University-Sacramento	Ed. Admin.
Multiple Subject Credential-Cross Cultural Spanish	1984	California State University-Chico	
B.A.	1983	California State University-Chico	Liberal Studies

Professional Experience

Dates		Title	District	Location	Enrollment
2017	to Present	Consultant	McPherson & Jacobson, L.L.C.	Omaha, NE	
2008	to 2016	Superintendent	Thermalito Union School District	Oroville, CA	1,400
2006	to 2009	Principal/Acting Superintendent	Thermalito Union School District	Oroville, CA	500
2006	to 2006	Middle School Principal	Oroville City Elem. School District	Oroville, CA	300
2001	to 2006	Elementary Principal	Oroville City Elementary School District	Oroville, CA	300
1996	to 2006	Elementary Principal	Oroville City Elem. School District	Oroville, CA	300
1991	to 1996	Elementary Principal	Eastside Elem. School and District Independent Study	Lancaster, CA	700
1989	to 1996	Bilingual Coordinator	Oroville City Elementary School District	Oroville, CA	300

Professional Organization Memberships

Name of Organization	Dates	Offices Held
Butte County Administrator Association	2004 to 2007	President
Quien es Quien in U.S. Commerce	1993 to 1994	Honored Member
Association of California School Administrators		Member
Association for Supervision and Curriculum Development		Member
California Association of Bilingual Educators		Member

Community/Service/Fraternal Organizations

Name of Organization	Dates	Offices Held
State ACSA Council: Equity Achievement and Diversity Council	2007 to 2010	
Oroville Orca Swim Association	1993 to 1999	President ('93-'95)
Thermalito Little League	1993 to 1995	Asst. Coach
Woodland J.U.S.D.	1986 to 1988	Coach JV/Varsity and President of ALMA
Los Baños U.S.D.	1985 to 1986	Coach

References for Julian Diaz

Mr. Joe Gibson, Board President
Anderson Union High School District
Anderson, CA
jgibson@sfi-insurance.com

Mrs. Cindy Trotter-Hogue, Board Member
Anderson Union High School District
Anderson, CA
chogue@hvsud.net

Mr. Ron Brown, Board Member
Anderson Union High School District
Anderson, CA,
psheltie@att.net

Teri L. Vigil
P.O. Box 669
McArthur, CA 96056
Email: t_vigil@macnjake.com
Phone: 530-227-0668

Educational Background

	1986	Cal Poly San Luis Obispo	Animal Science
A. A.	1984	Fresno City College	Liberal Arts Transfer

Professional Experience

	Dates	Title	District	Location
	2017 to Present	Network Facilitator	CSBA Professional Learning	
	2014 to Present	Consultant	McPherson & Jacobson, L.L.C.	Omaha, NE
	2012 to Present	Executive Consultant	Safe Schools Alliance	
	2001 to Present	President	Fall River Joint Unified Board	
	1986 to 1988	Vet Assistant	Dr. Leroy Krum	

Professional Organization Memberships

Name of Organization	Dates	Offices Held
Safe School Alliance	2012 to Present	
CSBA	2016 to Present	Board Member
Federal Relations Network	2008 to Present	
Negotiating team member CSEA and FRTA	2003 to Present	Member
Fall River Joint Unified School District, Representing Shasta County	2001 to Present	Board Trustee
Fall River Elementary	1995 to 2001	Council Member
Intermountain Preschool Coop	1991 to 1998	Board Member

References for Teri Vigil

Claire Schumacher, Board Member
Fort Sage Unified School District
Herlong, CA
Phone: (530) 827-2129

Julie Olsen, Board President
Saugus Union School District
Santa Clarita, CA
jolsen@saugusud.org

Mr. Joe Gibson, Board President
Anderson Union High School District
Anderson, CA
jgibson@sfi-insurance.com

Selected References

Bend-La Pine Schools

520 NW Wall St.

Bend OR 97701

School Phone: 541-355-1000

School District Contact: Andrea Wilson

Board Contact: Nori Juba/Cheri Helt /541-317-9777, 541-788-7872/541-460-3845

Search Year: 2014/15

Enrollment: 17,300

North Bend School District

1913 Meade St.

North Bend OR 97459

School Phone: 541-756-2521

School District Contact: Cheri Schreiber

Board Contact: Julianna Seldon, 541-297-7766

Search Year: 2018/19

Enrollment: 2,300

Reynolds School District

1204 NE 201st Ave.

Fairview OR 97024

School Phone: 503-661-7200

School District Contact: Connie Philibert

Board Contact: Joe Teeny, 503-680-9632

Search Year: 2017/18

Enrollment: 11,200

Springfield Public Schools

640 A Street

Springfield OR 97477

School Phone: 541-747-3331

School District Contact: Judy Bowden

Board Contact: Zach Bessett, 541-914-8959, 541-914-8959

Search Year: 2018/19

Enrollment: 10,700

Responsibilities of Eagle Point School District 9 and McPherson & Jacobson, L.L.C.

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

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

Eagle Point School District 9

Event	School District's Tasks
1 st Board Meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Provides consultant with the necessary information to create the brochure; the name of the Point of Contact; and the board member list <input type="checkbox"/> Reviews the brochure
Community meetings are scheduled	<ul style="list-style-type: none"> <input type="checkbox"/> Names and addresses are sent to Home Office for community member stakeholder meeting invitations <input type="checkbox"/> Notifies internal stakeholders of times and locations for stakeholder meetings <input type="checkbox"/> Posts dates, times and locations of meetings and public forum(s) and encourages stakeholder attendance <input type="checkbox"/> Publishes link to online stakeholder input survey
3 rd board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Board decides if they wish to conduct semi-finalist interviews <input type="checkbox"/> Assist with lodging arrangements and welcome gifts <input type="checkbox"/> Arrange for spouse/significant other tour <input type="checkbox"/> Arrange logistics for stakeholder focus groups
Semi-finalist Interviews	<ul style="list-style-type: none"> <input type="checkbox"/> The board interviews each semi-finalist <input type="checkbox"/> The board determines the finalists to be interviewed
Interviews	<ul style="list-style-type: none"> <input type="checkbox"/> One candidate per day <input type="checkbox"/> Board member greets each candidate upon arrival to district <input type="checkbox"/> Coordinates candidate's meeting with stakeholder focus groups and retrieval of input forms <input type="checkbox"/> Informal interview-social setting <input type="checkbox"/> Formal interview <input type="checkbox"/> Spouse/significant other's visitation is coordinated
Meeting to Select Finalists/ Finalist selected and accepted	<ul style="list-style-type: none"> <input type="checkbox"/> Board members meet and discuss each candidate individually <input type="checkbox"/> Individually rank order candidates <input type="checkbox"/> Read input forms submitted by stakeholder focus groups <input type="checkbox"/> Select minimum of #1 and #2 candidates <input type="checkbox"/> Contact consultant with selection results <input type="checkbox"/> Send interview forms and files to the Home Office <input type="checkbox"/> Board completes an evaluation of the search service provided by McPherson & Jacobson
Phase V	<ul style="list-style-type: none"> <input type="checkbox"/> Superintendent creates plan with target objectives and timelines <input type="checkbox"/> Board adopts plan <input type="checkbox"/> Send copy of plan to Home Office

Investment

The investment for conducting the superintendent search is \$9,900 for Phases I-V.

The total not to exceed amount including expenses is \$16,400.

Included in the expenses is

- 30 days of advertising on AASA
- 30 days of advertising on TopSchoolJobs
- 1 day of stakeholder meetings
- Consultant travel expenses for four (4) trips to the district
- One online stakeholder input survey (in English)
- Video interviews for five (5) candidates
- Criminal/financial/credential verification background check for the final candidate
- Office expenses

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.

Additional Services:

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

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

Price Breakdown for Search Activities

Phase	Description of Services	Fee	Expenses
I	Meet with board to start search process. Start development of application materials. Initiate advertising.	\$1,900	\$1,950
II	Conduct stakeholder input meetings. Begin candidate recruitment.	\$2,300	\$2,100
III	Continue candidate recruitment. Conduct reference checks on applicants.	\$2,300	\$300
IV	Meet with the board to review applicants and identify finalists to be interviewed. Assist board with interview questions and schedule. Coordinate candidate visits to the district.	\$1,900	\$1,200
V	Meet with the board to determine the superintendent performance objectives.	\$1,500	\$950
Totals		\$9,900	\$6,500
	Total*	\$16,400	

*Fees and/or expenses will increase if

- the board chooses advertising media over \$ 1,000;
- the board requests more than one (1) day 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.

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.

Transparency—The McPherson & Jacobson Difference

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

An open process

“Any government entity wanting to conduct a model search for a high-profile executive would be well-served by the studying the hiring of a new superintendent by the Sioux City Community School District.”...

“As interested, affected observers and taxpayers, residents of the district should appreciate the openness with which the school system approached the stretch run of the search.

The public was provided with specific details about the last stages of the process, all the way through the final decision, which was announced Friday.”...

“When government does not act in proper open fashion, we criticize. Conversely, government deserves credit when it goes the extra mile to provide the public with information it wants and to which it is entitled.

Instead of cloaking its careful, thorough search for a superintendent in dark secrecy as a decision neared, the Sioux City school district opened it to the sunshine of public discourse. As a result, residents of Sioux City can feel comfortable with the choice...*and* with the process by which he was selected.”

Taken in part from the *Sioux City Journal*, April 15, 2008.

www.Siouxcityjournal.com

Open search process, solid choice

“....

“A lot has changed in the Fayette County Public Schools in the eight years since the school board smuggled in a candidate for superintendent under an umbrella to hide his identity from the public.

“The search that just culminated with the hiring of Tom Shelton was as commendable for its openness as that earlier search was memorable for its silliness — and its unfortunate outcome: the winner resigned after just eight months.

“Process does matter. It matters a lot when selecting the leader of a public institution. So, before moving on to the next chapter, the board deserves a shout out for the way this search was managed.

“... ”

“Having been chosen through an open process in which stakeholders had the chance to participate gives him a leg up on gaining that trust and respect. We wish him well.”

**Taken in part from *Open search process, solid choice* | Editorial | Kentucky.com
<http://www.kentucky.com/2011/06/15/1775505/open-search-process-solid-choice.html>**

Wake names three superintendent finalists

“Veteran career educators from North Carolina, Virginia, and Texas are the three finalists vying to replace Tony Tata as superintendent of Wake County school system.

“... ”

“The three will meet with the public at a forum scheduled for Tuesday. The board will interview them the next day with the final vote possibly coming during the June 4 meeting....

“.... ”

“Not since 1995 had the school board released the names of the finalists for superintendent. McPherson & Jacobson, the Nebraska-based search firm hired by the board, said that naming the finalists and having them meet with the public would make the process more transparent and lead to greater public support when the board makes its choice.

“The school board reviewed 23 applications, ultimately choosing semi-finalists who were on a short list recommended by the search firm. The board interviewed the four semi-finalists last week.

“... ”

**Taken in part from
www.newsobserver.com/2013/05/22/2908354/wake-names-superintendent-finalists.html
May 22, 2013**

Superintendent hiring process involves significant cross-section of G.I. [Grand Island]

“The Grand Island school board, and in fact the entire community, is in the midst of an extremely important process. That is selecting a new school superintendent.

The school board has set up a very open process in which each of the four finalists are coming to Grand Island this week for a full day, visiting with teachers, school officials, community members, business people, the media and being interviewed by the school board.

While it certainly makes for a full week, it is a good process that allows a variety of community members an opportunity to meet the finalists and give their input on the selection.

...

...The board has also taken the important step of opening the process to the community, rather than just keeping it among board members.

It’s important that the school board receive input from as much of the community as possible. Ultimately, it will be the board’s decision on whom to hire, but involving the community in the process was a wise move.

The timing of the selection of the finalists and the interviews also have been good. The Grand Island board is going through the process early enough in the school year so that whomever they select won’t be leaving their current school district in a lurch in finding a new superintendent.

...”

**Taken in part from *The Grand Island Independent*, December 1, 2010.
Grand Island, NE**

Opinion

“We ... want to salute the five school board members for the open and inclusive process they followed in narrowing the field of candidates and reaching out to the North Thurston community to come to the best choice [new superintendent] for the district and its 13,500 students.”...

“It was an excellent, open and transparent superintendent selection process and the board members deserve credit not only for the process but for listening to their community.”

Taken in part from *The Olympian*, April 8, 2009

An open superintendent search process is good for the community

“Now that the search is on for a candidate [superintendent], I believe the entire process could not be in better hands [McPherson & Jacobson]...When the CCEA [Culpeper County Education Association] executive board members met with them [McPherson & Jacobson], my first impression was one of complete relief.”...

“They [McPherson & Jacobson] explained that before any candidates come before the School Board, they will be vetted with deep background checks and will be matched up with the profile for the CCPS [Culpeper County Public Schools] position. Each candidate will not only be thoroughly interviewed by the School Board, but also will have a chance to meet with stakeholders before the final decision is made.”...

“...I commend the board for its decision to contract with McPherson and Jacobson to handle our superintendent search.

This is not just a corporate head-hunting firm seeking a field of generic candidates.”...

“The fact that the process had complete transparency is good for all stakeholders.”

Taken in part from Walker, Jeff, 2009. *Culpeper Star Exponent*, February 4

Conducting a super search

“We don’t know who will ultimately be selected to lead the South Bend Community School Corp. into the future, but we—and indeed the public—know plenty about the process leading up to the hiring of the next superintendent.

“...So far, the search has been transparent. It has been inclusive, not merely accepting public input, but firmly demanding it.

“..."

“From the start, members of the public were included in the search. A citizen advisory committee was formed and charged with soliciting input from community members about the challenges and strengths of the district, and the qualities the next super should possess.

“..."

“The search also included 29 community forums, in various locations across the community, for the public in general, as well as such specific groups as teachers, not-for-profits and government boards.

“In short, the process of finding South Bend’s schools chief has been a model for how such a search ought to be conducted...”

“..."

Taken in part from
southbendtribune.com/news/opinion/sbt-20111103sbtmicha-07-04-20111103,0,58885628.story

Board of Education Scores New Superintendent

“The process to find the new super [superintendent for the Marshalltown Community School District] was done in collaborated fashion over three months which included hiring the search firm McPherson & Jacobson to collect applications and put them through vigorous interviews in order to narrow the field to five finalists. In the home stretch, several focus groups (represented by community members, parents, teaching staff, students, businesses, central office staff, and building administrators) interviewed the five candidates in five days before the board rendered its choice Saturday afternoon....

“...remarked Macmillan [Board President Adrienne Macmillan] ‘The expertise and professionalism that McPherson & Jacobson brought into this process was phenomenal. They really made themselves an extension of our educational community and worked with us in a very detailed level to help work through our selection criteria. It really made our job very easy in the fact that we got 18 total candidates at this time of the year and with the vast majority having solid superintendent experience, it is a credit to their firm.’

“In all, the Board was pleased how the community and focus groups rallied around choosing the new leader, exhibiting a team effort, as well as spirit. Macmillan concluded. ‘It truly demonstrates that whole adage about how it takes a village to raise a child, and this was it.’”

Taken in part from Lawson, Tammy. *The Marshall County Sun*, May 15, 2008.

Fayette school board might announce superintendent finalists Tuesday

“The search for a new Fayette County Public Schools superintendent is entering its final, crucial phase, and the names of finalists for the post could be revealed Tuesday night.

“...

“...McPherson & Jacobson, the schools’ superintendent search firm, plans to notify probably finalists to stand by for calls Tuesday night, so notifying those selected could take only a few minutes. That would allow the board to make the names public soon after members make their decisions.

“....

“Board members plan to bring each finalist to Lexington for tours of the school district; interviews with the board, meetings with education, civic groups and the media; and a session with the public. One finalist would visit each day of that process.

“....”

**Taken in part from
<http://www.kentucky.com/2011/05/31/1758135/fayette-school-board-might-announce.html>
June 2, 2011**

Public or Secret: Districts Hire Top Leaders Differently

“Davenport, Iowa—Local school boards have been put to the test: pick a superintendent in the light of day or do it behind closed doors. When hiring a new leader in Iowa, it’s ultimately school board members who decide whether to involve the community that elected them.”...

“In the North Scott School District, board members decided to ... conduct their search in secret. Next door, the Bettendorf school board opted for another route: transparency. ... In Bettendorf’s case, the board made its final selection with input from an informed public that knew the candidates and their backgrounds.”...

“ ‘One of the arguments is that no one will apply if we do it publicly,’ said Charles Davis, executive director of the National Freedom of Information Coalition. ‘I guess that was refuted by the fact that you did have candidates for both jobs. There is not a (bit) of evidence out there supporting that thesis.’

From the beginning, Ray and Associates, the search firm hired by North Scott... promised applicants confidentiality, some finalists said. McPherson & Jacobson, a search firm hired by Bettendorf...told candidates the process would become public once the board selected finalists. Despite their different approaches, both attracted dozens of candidates from across the country. Both searches, members in Bettendorf and North Scott said, ended in the hiring of a qualified candidate.

Those who favor more open searches say the promise of confidentiality doesn’t dissuade a majority of applicants. Instead, it allows parents and other residents an opportunity to take part in the selection process, they said. ‘The people in Bettendorf know whether or not the applicant pool was diverse,’ Davis said. ‘They know whether the applicant pool was filled with experienced or inexperienced candidates. They know whether an insider candidate was rejected for an outsider candidate. They can compare one person’s resume against another. In North Scott, we don’t know anything, and we never will. There is certainly something that gets lost in that.’ ”...

“...The board [Bettendorf] decided early in the process after consulting with McPherson & Jacobson to keep the process open, something the search firm supported, said Wayne Rand, a search consultant for McPherson & Jacobson. To accommodate the board members’ decision, the district held public forums for each finalist so residents who wanted to could attend.

The board wanted to send a clear message that ‘the stakeholders’ input was valued,’ said Judy Miller, human resources director for Bettendorf. ‘There is no reason to keep that information from the public. They are interested in knowing who we are looking at and why.’

Rand said his experience in Bettendorf isn’t unique. Instead, every school board he’s dealt with during superintendent searches in Iowa has kept the process open for the public. And, each time, his search firm was able to land a large pool of qualified candidates... Taxpayers are interested in knowing because of the money being spent. If you exclude people, it’s natural that they feel left out, and they want to be involved in something like this.

Taken in part from *The Quad City Times*, March 9, 2009

Editorial

“Being involved in the search process for the new superintendent for Culpeper County Public Schools puts me a position that I do not mind being in. It is not a position of power, but I am involved, as are the other employees of CCPS and the community.”...

“...McPherson and Jacobson’s representatives...began the process of finding out what the School Board and other stakeholders were looking for, finding and vetting the potential candidates and presenting the narrowed field to the board.”...

“During this process, to my knowledge, the Culpeper County School Board has followed the recommendations of McPherson and Jacobson very closely. I believe they did this out of a sense of the importance of the situation and a respect for the professionals they charged with carrying out the task of helping match up a superintendent with our school system.”...

“...This executive search firm has either completed or is in the process of approximately 40 searches in 11 states for superintendent and other top administrators.”...

“Remember a school superintendent is not an elected official; he or she serves at the will of a School Board. The Culpeper County School Board has involved various segments of the school division and the public in the process. Veteran teachers who have been in Culpeper long enough to have worked under more than one superintendent have said the current process is the most open they have seen. By the end of this week, many individuals will have had a chance to see and hear and interact with the five candidates. Their input will be looked at. But, ultimately, the decision of whom to hire rests solely on the shoulders of the members of the elected School Board. That is one of the basic tasks of a School Board.”...

“Don’t we owe it to the 8,317 individuals under their [the new superintendent] leadership the opportunity for the process to find the right person for the job? And shouldn’t the manner in which we find the new superintendent be open and honest and without premature judgment?”

Taken in part from Walker, Jeff, 2009. *Culpeper Star Exponent*, April 1

Wake wise to announce superintendent final

“The Wake County school board is looking for a new superintendent of schools. Whether it will make the right choice remains to be seen, but it bodes well that it’s making the choice right away.

“The board, following the advice of its search firm, McPherson & Jacobson, has agreed to publicly identify its two or three finalists for the job of leading the state’s largest school district. The final candidates won’t only be named, they’ll come to Wake County and meet with the public.

“What a refreshing and sensible change from the secrecy that has surrounded the selection of new superintendents.....

“....”

**Taken in part from
www.newsobserver.com/2013/05/13/2890369/wake-wise-to-announce-superintendent.html
May 13, 2013**

Superintendent—District hires firm to assist in search; student provide input through student interview panel

“... The Board of Education...chose to hire the executive recruiting and development service, McPherson and Jacobson, to find Westside’s next leader.

“ ‘The board, in an open meeting, defined what we saw as our key objectives—what are the criterial? What are the qualities we would like to see in our next superintendent?’ said Scott Hazelrigg, one of the directors on the Board of Education...

“McPherson and Jacobson used the criteria the board established and the Stakeholders input report to select certain individuals to encourage applying.

....

“From Jan 16-20, Westside hosted the five finalists of the superintendent search for a series of interviews. Each day, a different candidate was welcomed into the Westside community by a coffee with school board members. The candidates then went on to participate in interviews with students, community members, teachers, administrators and the Board of Education.

...

“Though the board will ultimately make the decision about who the next superintendent will be, students received the opportunity to be involved in the process.

“ ‘One of the things we liked about the consultant was that they historically engaged a student group in the process,’ Hazelrigg said.

“Every morning a small group of juniors and seniors gathered in the conference room to meet the candidates....

“The questions the student panel asked included, ‘Why/how do you feel the input from the students is necessary when making choices?’ and ‘How do you make sure all students’ needs are met with so much diversity?’

“Junior Maddie Ryan led the student panel. Ryan prepared for the interviews by compiling questions suggested by the search firm in addition to those students requested, and doing preliminary research on the candidates.

“ ‘I think that it’s a really great opportunity that they are asking students, and I hope that whoever the superintendent is will continue to have student involvement,’ Ryan said.

“During the interviews, all students were engaged by asking candid questions and diligently taking notes.

“ ‘Everyone is pretty engaged; they are asking intelligent, thoughtful questions,’ Ryan said.

“...Other focus groups include teachers, key community members and members of the Westside Foundation.

“The student interviews allowed the board not only to get insight into what the students thought of the candidates, but also provided the candidates with an opportunity to hear from the students.

“ ‘There aren’t any adults here, which is really nice because I think students are more open, and I feel the candidates are more receptive because you’re not worried about what sounds good or what would offend someone,’ Ryan said.

“ ‘I think it gives [the candidates] really good insight, and us a really good insight too,’ Ryan said.”

Taken in part from Goodman, Maddie, Westside *Lance*, Spring 2012

A Community Effort for a Community Superintendent FIRM DECISION

District hires unbiased executive search firm

“The school district hired the firm McPherson and Jacobson to assist in the search for our next superintendent. The firm specializes in executive searches and has helped with both the advertising and interview processes.

...

“Five different panels—a student, Westside Foundation, volunteer, teacher and administrative panel—interviewed each candidate separately.

“All five panels submitted a formal write-up detailing their opinions of the five candidates. The school board will take the panels’ opinions into consideration when making the final decision.

...

“...we believe hiring an experienced firm to help with selecting our next superintendent was a great idea

“McPherson and Jacobson was responsible for bringing in 28 candidates from all over the country, giving the district greater variety than it would have had choosing a superintendent internally.

“The firm also oversaw a more extensive selection process. It suggested the district create the five panels to interview each candidate, helped choose the panels and provided questions the panels should ask the candidate.

“The superintendent deals with the entire community, so it is only logical that the decision is a community effort.

...

“ ‘[The school board] gained a student opinion, a thoughtful, careful consideration of us and what we want in a superintendent, which they can’t always get themselves,’ senior and student panelist Jacob Lehr said.

“This process allowed each group to offer its unique perspective and will encourage the school board to choose a well-rounded candidate.

...

“In addition, this extensive process will hopefully produce an unbiased decision.

“ ‘I was very pleased with how with how it went,’ [Principal Maryanne] Ricketts said. ‘I like how all the Stakeholder groups were involved. I liked that we had a student group who met with each candidate. Everybody took this very seriously. The groups gave the school board good feedback.’

“Every part of the process went through the firm, and, as a result, the process went smoothly.

“The *Lance* believes the school board made the correct decision in hiring McPherson and Jacobson to assist in the superintendent search.”

Taken in part from Westside *Lance*, Spring 2012

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

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

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

...

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

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

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

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

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

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

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

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

...

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

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

From: Nancy VanBeek [<mailto:NVanBeek@WashingtonPavilion.org>]

Sent: Wednesday, November 29, 2006 4:24 PM

To: t_jacobson@macnjake.com

Subject: Thank you

Mr. Jacobson

Thank you so much for your time with us yesterday. The meeting was (surprisingly enough) enjoyable and the way you were able to draw out our ideas, insecurities, needs and wishes. The meeting once again gave me hope for the future of the work we do here.

I look forward to meeting the candidates you feel will be able to meet our varied needs and I am very grateful that you will be with the new Director as he/she takes the position. This transition time will be made much easier with a mentor to provide insight into all the different expectations of the position.

Thank you for being a good listener and a super facilitator.

Nancy Van Beek

KSDC Education Manager

Washington Pavilion of Arts and Science

301 S. Main Ave.

Sioux Falls SD 57104

(605_ 367-7307 ext 2374

www.washingtonpavilion.org

From: Laura Bednar

Sent: Thursday, December 20, 2007 12:05 PM

To: t_jacobson@macnjake.com

Subject: thank you

Dear Dr. Jacobson

.....

Your company has been extremely helpful to me as I have stepped into the superintendency, and I certainly recommend McPherson and Jacobson to anyone that I can! More than anything else, I have no doubt that the follow-up work that is done with School Boards and Superintendents is the most essential piece. I cannot thank you and your consulting team enough for how your leadership and guidance has truly turned our district around! I wish every school district had the opportunity to experience what we have with McPherson and Jacobson.

Thank you again,

Laura Bednar
Superintendent
Stuttgart School District

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

BOARD OF EDUCATION

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

SUPERINTENDENT

Jeffrey L. Baarstad, Ph.D.



June 3, 2015

To Whom It May Concern:

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

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

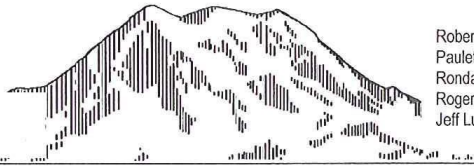
We were on a tight timeline and, like many board members, I have a demanding schedule outside of my school board responsibilities. Anita and Ed were available to me in the evening and on weekends when questions and conflicts arose. They did the detail work and planning so that we didn't have to. The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

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

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

Betsy Connolly DVM

**EATONVILLE
SCHOOL DISTRICT**
Superintendent Rich D. Stewart



Robert Homan, President
Paulette Gillardi, V-President
Ronda Litzenberger, Director
Roger Andrascik, Director
Jeff Lucas, Director

Together, we commit to excellence in education and preparation for life.

June 21, 2013

Dr. Thomas Jacobson
McPherson & Jacobson
7905 L Street Suite 310
Omaha NE 68127

Dear Dr. Jacobson,

My name is Robert Homan and I am the School Board President with the Eatonville School District. I just wanted to drop you a note of extreme satisfaction about, Al Cohen and Mike Boring, two of your consultants. We have enlisted their services twice now in the last three years and I wanted to let you know what outstanding individuals they are and what a pleasure it has been to work with them!

Al and Mike impressed our Board with their knowledge of the process in hiring a qualified Superintendent. Their ability to advise us on timelines, qualities to look for and experience levels that will work well in our district was invaluable. Finally their professionalism is unmatched when it comes to their ability to work with people and understand perspectives. Their skills to assimilate information and to apply that information to attain the best outcome for the needs of our district was impressive.

Needless to say, that we are and were very happy with the candidate pool along with the selections we have made for our Superintendents of Eatonville Public Schools. I would have no problem recommending either one or both of these men to any District looking for consultants for this process.

We will definitely keep your firm at the top of the list when it comes to consulting on this and any other pertinent service you offer.

On behalf of myself and the rest of the Board of Eatonville School District, we wish to express our appreciation.

Respectfully,

Robert Homan
Board President
Eatonville School District #404

Equal Employment & Educational Opportunities • Eatonville School District #404 • PO Box 698 • Eatonville, WA 98328 • Telephone
(360) 879-1000 • Fax (360) 879-1086



LITTLE ROCK SCHOOL DISTRICT

OFFICE OF THE SUPERINTENDENT

March 1, 2013

Dr. Thomas Jacobson
McPherson & Jacobson, LLC
7905 L Street, Suite 310
Omaha, NE 68127

Dear Dr. Jacobson:

On behalf of the Little Rock School District Board of Directors, I would like to thank you for the professional manner in which the search process for our next superintendent has been conducted. I commend our lead consultant, Ms. Loe Dunn, and her assistants, Dr. Kieth Williams and Dr. John Smith, for guiding us through the process of selecting and interviewing our next leader.

I would recommend your organization to anyone who requires the services of an executive firm to coordinate their search process.

Again, thank you for the professionalism demonstrated by your team. Your service has been invaluable to us.

Sincerely,


Dianne Curry, President
LRSD Board of Directors

Date: Wednesday, September 26, 2012, 10:33 PM

“....

“The entire process of a Superintendent search firm from start to finish has been a learning experience for me and I strongly believe it was made easier because of your knowledge, expertise, just being excellent to work with as well as the over professionalism of the firm.

“Again, thank you for all the assistance you provided to our district....”

Thanks,
Connie McElyea
Moline [Illinois] Board of Education



Reynolds School District
Administration Offices
1204 NE 201st Avenue
Fairview, OR 97024
503.661.7200 • FAX 503.667.6932

April 26, 2012

To Whom It May Concern:

I am the Chair of the Reynolds School District, serve on the Board of a non-profit Women's Shelter, am a Consumer Arbitrator, a very active community advocate, and have extensive Executive and Human Resource Management experience. I am compelled to write on behalf of the firm McPherson & Jacobson's Executive Search Consultant Services.

This year our district contracted with the McPherson & Jacobson to conduct a national search to replace our retiring Superintendent. As promised, they delivered excellent, comprehensive services from start to finish. The fact that we were assigned a senior partner and two regional consultants created synergy and success in the process. Their multi-pronged protocols ensured that all stakeholders both internal and external experienced high levels of confidence in both the process and the outcome.

The range and quality of the service delivery was superior. From facilitating widespread community input for design and delivery of a professional search brochure, to national advertising, screening committee management, a survey, stakeholder forums and press releases our board, staff and community strongly supported the process and are very satisfied.

The individuals assigned to us were Dr. Tom Jacobson, Dr. Bill Dean and Mr. Rich Parker. Their varied skills and years of educational experience is an excellent match for any district. They spent tireless hours of support to address staff, citizen and community involvement concerns. They innovatively united diverse processes and combined their energies to accomplish our goals on an extremely tight timeline during a difficult time for our district. Through it all they remained highly organized, exhibited excellent verbal, written and interpersonal skills, while remaining versatile and reliable. Their services were not only strategic but enthusiastic, effective and solution oriented. They delivered results.

In conclusion, their professional services combined with a caring style made our search robust and effective. Your organization would be fortunate to have them provide the same service.

Please share this information with any parties that are interested or may affect decisions regarding this matter. If you require elaboration, please feel free to contact me. I would be happy to share more information.

Respectfully,

Theresa Delaney Davis

Theresa Delaney Davis
Chair

A great place for learning.

www.reynolds.k12.or.us/schools/

July 30, 2018

McPherson Jacobson, LLC
7905 L Street, Suite 310
Omaha, Nebraska 68127

To Whom it May Concern:

With this being my first superintendent search, I would like to say I had the good fortune of working with Dr. Robert Williams. His presentation to the school board was thorough, accurate and well documented. Immediately, we knew he had the talent and skills far beyond our responsibilities to give us what we were looking in for our superintendent.

There were several factors we were looking for in our search, Dr Williams was very transparent in the process and always gave us the information we asked for. The step by step process was handled very professionally. After each step was given to us, he allowed us the freedom to act accordingly to each applicant. He was never biased on any one person but gave us valuable information in general. After the board gave him what we were looking for in our search, he used his knowledge and reputation to acquire several top notch applicants to apply. Without him knowing these people we probably would not have ended up with the superintendent we have. The community and staff of our school has embraced our superintendent and we are heading toward improving our scores and the financials are improved with several projects along the way.

I am honored to write this letter on behalf of McPherson Jacobson, LLC and I would encourage anyone that is searching for a superintendent to call them, you won't be disappointed!

Sincerely,

Jeff Owyong
McGehee School District President

July 13, 2018

From: Julie Sexton, Board President
West Branch Community School District, West Bend, Iowa

Our board made the decision to hire McPherson & Jacobson to conduct our search for a new Superintendent and we are glad we did! Hiring a Superintendent is one of the most important responsibilities the board has so we wanted to make sure we did what we could to find the best fit for our students and district. Our consultant (Gary McAndrew) was on task as soon as the hiring occurred. We had to move quickly and we had a timeline to us immediately. The expertise and professionalism brought into this process was remarkable. We ended up with many qualified candidates. A lot of time was put in by our consultant to make sure we had all of the information necessary to make a well-informed decision as to who our final candidates would be for the board to interview. It was also important to the board that our search be conducted with as much transparency as possible and we were able to achieve this by having stakeholder groups provide input and be meaningfully involved in the process. McPherson & Jacobson use the motto "It's About the Kids" which rings true in all our board does, especially in regard to the search for a new Superintendent. In our partnership with this search firm, we were able to find a Superintendent we believe will bring quality leadership which in turn will continue to focus on quality education and move our district forward. Our board is very pleased with the outcome of our search and would be happy to share our experience with any other boards who may be looking for a Superintendent search firm in the future.



Leslie Fye

6 hrs · 🌐

I just have to brag on my school district and the process they have adopted to select our next School District Superintendent. SOCSO hired an awesome firm - McPherson and Jacobson - to conduct our Superintendent search. Under their guidance the district has had listening sessions in the community to gather input for what our vision was/is for the next Superintendent. Applications are in and the Board selected their top 3. Interviews began today. The candidates are being interviewed by faculty focus groups and community stakeholder focus groups. The focus groups participated in creating the main group interview questions and were allowed to ask other questions at the end of the interview. Feedback from the focus group was documented and will be given to the School Board. The School Board will hold their own private interview. Whatever the result, the process has been a positive one for our community!

2 Shares



*Starkville Oktibbeha Consolidated School District, Starkville, Mississippi,
February 2017*

Applicant Diversity

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

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

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

<u>Search Year</u>	<u>School District/Entity</u>	<u>Person Placed</u>
2017-2018	Berkeley USD, CA— Exec. Dir for Special Education	Dr. Jan Hamilton
2017-2018	Okanogan School District, OR	Mrs. Ashley Goetz
2017-2018	Foreman School District, AR	Mrs. Patricia Tankersley
2017-2018	Jackson Public Schools, MS	Dr. Errick Greene
2017-2018	McCleary School District, WA	Ms. Shannon Ramsey
2017-2018	Fort Sage Unified School District, Herlong, CA	Dr. Christopher Bonn
2017-2018	Madison County School District, Ridgeland, MS	Ms. Kimber Halliburton
2017-2018	Roseville Joint Union High School District, CA	Dr. Denise Herrmann
2017-2018	Mabton School District, WA	Mr. Joseph Castilleja
2017-2018	Saugus Union School District, Santa Carlita, CA	Dr. Colleen Hawkins
2017-2018	Denair Unified School District, CA	Dr. Teresia Chevalier-Metzger
2017-2018	Reynolds School District, Fairview, OR	Dr. Danna Diaz
2017-2018	Soap Lake School District, WA	Ms. Darnella Pray
2017-2018	East End School District, Bigelow, AR	Ms. Lori Edgin
2017-2018	Ogden Community School District, IA	Dr. Pamela Dodge
2017-2018	Webster City Community Schools, IA	Dr. Amanda Ross
2017-2018	Liberty Elementary School District, Buckeye AZ	Dr. Lori Shough
2017-2018	South Central Nebraska Unified #5, Fairfield, NE	Ms. Julie Otero
2017-2018	Ellensburg School District, WA	Mrs. Jinger Haberer
2017-2018	Parlier Unified School District, CA	Mr. Jamie Robles
2016-2017	Cold Spring School District, Santa Barbara, CA	Dr. Amy Alzina
2016-2017	New Haven Unified School Dist., CA	Dr. Arlando Smith
2016-2017	Carlsbad Municipal Schools, NM	Dr. Gregory Rodriguez
2016-2017	School District of Fort Atkinson, WI	Dr. Beverly Brown

2016-2017	Starkville Oktibbeha Consolidated School District, MS	Dr. Eddie Peasant
2016-2017	Richland School District, CA	Dr. Dagoberto Garcia
2015-2016	Oxnard Union High School Dist., CA	Ms. Penelope DeLeon
2015-2016	Alisal Union School District, CA	Dr. Hector Rico
2015-2016	Johnstonville Elem. School Dist., CA	Dr. Melanie Spears
2015-2016	East Dubuque School District, IL	Mrs. Tori Lindeman
2015-2016	Hemet Unified School District, CA	Ms. Christi Barrett
2015-2016	Ottumwa CSD, IA	Ms. Nichole Koolker
2015-2016	Charlotte-Mecklenburg Schools, NC	Dr. Clayton Wilcox
2015-2016	Rapid City Area School District, SD	Dr. Lori Simon
2015-2016	Francis Howell School District Saint Charles, MO	Dr. Mary Hendricks-Harris
2015-2016	Glendale Unified School District, CA	Mr. Winfred Roberson
2015-2016	Grand Island Public Schools, NE	Dr. Tawana Grover
2015-2016	Othello School District No. 147, WA	Dr. Kenneth Hurst
2014-2015	Penn Valley Union Elementary School District, CA	Dr. Torie England
2014-2015	Newcastle Elem. School District, CA	Ms. Denny Rush
2014-2015	Seattle Public Schools, WA (Director of Enrollment Planning)	Ms. Ashley Davies
2014-2015	Caney Valley USD 436, KS	Mr. Blake Vargas
2014-2015	Birmingham City Schools, AL	Dr. Kelley Gacutan
2014-2015	Cherokee Community School Dist., IA	Ms. Kimberly Lingenfelter
2014-2015	Chief Leschi Schools, Puyallup, WA	Dr. Amy Eveskcige
2014-2015	Colts Neck Township Schools, NJ	Ms. Mary Jane Garibay
2014-2015	Conejo Valley Unified School District Thousand Oaks, CA	Dr. Ann Bonitatibus
2014-2015	El Monte Union High School Dist., CA	Dr. Irella Perez
2014-2015	Gustine Unified School District, CA	Mr. William Morones
2014-2015	Hot Springs School District, AR	Mr. Mike Hernandez
2014-2015	San Juan Island School District Friday Harbor, WA	Dr. Danna Diaz
2014-2015	Sunnyside Unified School District Tucson, AZ	Mr. Steven Holmes
2014-2015	Unity Charter School, Morristown, NJ	Ms. Connie Sanchez
2014-2015	Watson Chapel School District Pine Bluff, AR	Dr. Connie Hathorn
2013-2014	Arkansas Arts Academy(Benton County School of Arts), AR	Mrs. Mary Ley
2013-2014	Caddo Parish Public Schools Shreveport, LA	Dr. Theodis Lamar Goree
2013-2014	Fallbrook Union High School District, CA	Dr. Hugo Pedroza
2013-2014	Gardner Public Schools, MA	Ms. Denise Clemons
2013-2014	Hermitage School District, AR	Dr. Tracy Tucker
2013-2014	Mary M. Knight School Dist., WA	Dr. Ellen Perconti
2013-2014	Winship-Robbins Elem. Schools, CA	Dr. Laurie Goodman
2013-2014	Valley Springs School Dist., AR	Ms. Judy Green

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
Educational Consultant
Athens, Alabama

Dr. Paul McKendrick
Retired Superintendent
Tuscaloosa, Alabama

Alaska Consultants

Mr. Shawn Arnold
Superintendent
Valdez, Alaska

Mr. Harry Rogers
Retired Superintendent
Petersburg, Alaska

Arizona Consultants

Dr. William Dean
Retired Superintendent
Tucson, Arizona

Ms. Barbara Dean
Retired from AASA
Tucson, Arizona

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

Dr. Les Huth
Retired Professor
Scottsdale, Arizona

Mr. Lawrence Mason
Retired Superintendent
Gold Canyon, Arizona

Mr. Pat Nauroth
Retired Superintendent
Cave Creek, Arizona

Ms. Jennifer Tanner
Board Member
El Mirage, Arizona

Arkansas Consultants

Mr. Wayne Gibson
Board Member
El Dorado, Arkansas

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

Dr. Diana Julian
Professor
Benton, Arkansas

Mr. Terry Julian
Retired Administrator
Benton, Arkansas

Mr. Bobby Lester
Retired Superintendent
Jacksonville, Arkansas

Dr. John H. Moore
Retired Superintendent
Magnolia, Arkansas

Dr. Megan Slocum
Associate Superintendent
Fayetteville, Arkansas

Dr. Tony Thurman
Superintendent
Cabot, Arkansas

Mr. Andrew Tolbert
Retired Superintendent
Warren, Arkansas

Mr. Mitch Walton
Professor
Searcy, Arkansas

Mr. Jerrod Williams
Superintendent
Bauxite, Arkansas

Dr. Kieth Williams
Retired Superintendent
Bald Knob, Arkansas

California Consultants

Mrs. Janice Adams
Retired Superintendent
Benicia, California

Mrs. Nicole Anderson
Educational Consultant
Vallejo, California

Ms. Aida Buelna
Retired Superintendent
Woodland, California

Mr. Robert Challinor
Retired Superintendent
Victorville, California

Mr. Julian Diaz
Retired Superintendent
Oroville, California

Mr. Robert Ferguson
Retired Superintendent
Napa, California

Mr. William Huyett
Retired Superintendent
Lodi, California

Mr. Benjamin Johnson II
Board Member
Riverside, California

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Retired Superintendent
Murrieta, California

Dr. Steven Lowder
Retired Superintendent
Stockton, California

Dr. Michael McCoy
Superintendent
Bakersfield, California

Mr. Jesse Modesto
Retired Administrator
Woodland, California

Mr. Dennis Murray
Retired Superintendent
Murrieta, California

Dr. Marilyn Shepherd
Retired Superintendent
Friant, California

Dr. John Sugiyama
Retired Superintendent
Indio, California

Mr. Edward Velasquez
Retired Superintendent
Chino, California

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

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Educational Consultant
Parachute, Colorado

Dr. Norman Ridder
Retired Superintendent
Arvada, Colorado

Florida Consultants

Dr. Marjorie Alexander Wallace
Retired IU Director
Palm Harbor, Florida

Georgia Consultants

Dr. Michelle King
Georgia Department of Education
Atlanta, Georgia

Idaho Consultants

Dr. Linda Clark
Retired Educator
Boise, Idaho

Dr. William Dean
Retired Superintendent
Post Falls, Idaho

Ms. Barbara Dean
Retired from AASA
Post Falls, Idaho

Mr. Don Hague
Consultant Emeritus
Retired Superintendent
Sandpoint, Idaho

Mr. Edward Velasquez
Retired Superintendent
Hayden, Idaho

Illinois Consultants

Dr. John Closen
Professor
Western Illinois University
Peoria, Illinois

Dr. Lloyd Kilmer
Retired Professor
Moline, Illinois

Iowa Consultants

Ms. Kimberly Antisdell
Retired Administrator
Grimes, Iowa

Mr. Dennis Bahr
Retired Superintendent
Webster City, Iowa

Mr. Michael Billings
Retired Superintendent
Story City, Iowa

Dr. Paul Gausman
Superintendent
Sioux City Comm. Schools
Sioux City, Iowa

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Retired Professor
Davenport, Iowa

Mr. Gary McAndrew
Former Board Member
Peosta, Iowa

Mr. Lyle Schwartz
Retired Superintendent
Story City, Iowa

Dr. Richard Sundblad
Consultant Emeritus
Urbandale, Iowa

Dr. Michael Teigland
Retired Superintendent
Indianola, Iowa

Mr. Richard Vande Kieft
Former Board Member
Cedar Falls, Iowa

Dr. Steve Williams
Consultant Emeritus
Monticello, Iowa

Kansas Consultants

Dr. Brad Rahe
Retired Superintendent
Mulvane, Kansas

Mr. Dennis Burke
Retired Superintendent
Baxter Springs, Kansas

Dr. James Christman
Retired Professor
Pittsburg, Kansas

Dr. Justin Henry
Superintendent
Goddard, Kansas

Mr. Von Lauer
Retired Superintendent
Sabetha, Kansas

Dr. Bradley Rahe
Retired Superintendent
Holton, Kansas

Mr. Howard Shuler
Consultant Emeritus
Topeka, Kansas

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Ms. Janet Dixon
Board Member
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Ms. Lorethie Dunn
Former Board Member
Bastrop, Louisiana

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Board Member
Shreveport, Louisiana

Dr. Gerald Keller
Past Superintendent/Board Member
Reserve, Louisiana

Mrs. Janet Pope
LSBA Staff Member
Lafayette, Louisiana

Mr. John Smith
Board Member
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Mr. Lawrence Mason
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Spring Lake, Michigan

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Oak Park Heights, Minnesota

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New Hope, Minnesota

Dr. Linda Madsen
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Forest Lake, Minnesota

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Retired Professor
Sartell, Minnesota

Mississippi Consultants

Dr. Tom Clark
Retired Superintendent
Petal, Mississippi

Dr. James Hutto
Retired Superintendent
Petal, Mississippi

Mr. Ronald Walker
Retired Superintendent
Hattiesburg, Mississippi

Missouri Consultants

Dr. Randal Bagby
Superintendent, La Monte R-IV School Dist.
Gravois Mills, Missouri

Mr. Destry Brown
Superintendent
Clinton, Missouri

Dr. James Christman
Retired Professor
Carl Junction, Missouri

Dr. Dennis Cooper
Retired Superintendent
Springfield, Missouri

Ms. Renee Goostree
Professor
Pittsburg State University
Joplin, Missouri

Dr. Jeanette Tendai
Retired Educator
St. Louis, Missouri

Dr. Philip Schoo
Superintendent Emeritus
Consultant Emeritus
Lake Ozark, Missouri

Dr. Judith Sclair-Stein
Retired School Administrator
Chesterfield, Missouri

Montana Consultants

Dr. Michael McLaughlin
Educational Consultant
Butte, Montana

Nebraska Consultants

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Retired Superintendent
Hershey, Nebraska

Mr. Alan Ehlers
Superintendent
Madison, Nebraska

Dr. Jerry Ehlers
Retired Superintendent
Ainsworth, Nebraska

Dr. Randall Gilson
Superintendent
Blair, Nebraska

Dr. Derrick Joel
Superintendent
Raymond, Nebraska

Dr. Mike Lucas
Superintendent
York, Nebraska

Mrs. Jane McDaniel
Former Board Member
Plattsmouth, Nebraska

Mr. Glen Morgan
Retired Superintendent
Fremont, Nebraska

Dr. Randy Nelson
Consultant Emeritus
Retired Superintendent
Seward, Nebraska

Dr. James Ossian
Professor Emeritus
Wayne State College
Wayne, Nebraska

Dr. Aaron Plas
Superintendent
Lakeview Community Schools
Columbus, Nebraska

Mr. Darren Tobey
Superintendent
Broken Bow, Nebraska

Dr. Jeffery West
Executive Director, ESU 13
Gering, Nebraska

Dr. Rob Winter
Retired Superintendent
Grand Island, Nebraska

New Jersey Consultants

Dr. Ralph Ferrie, Jr.
Superintendent
Brick, New Jersey

Floral Park, New York Dr. Candis Finan
Retired Superintendent
Summit, New Jersey

New Mexico Consultants

Mr. Vernon Asbill
Retired Superintendent
Artesian, New Mexico

New York Consultants

Dr. William Christensen
Superintendent, Sidney Central
Binghamton, New York

Dr. Ralph Ferrie, Jr.
Superintendent, Sewanhaka
Central High School District
Floral Park, New York

Dr. John Gratto
Professor
Plattsburgh, New York

Dr. Martin Handler
Superintendent, Pine Planes
Elizaville, New York

North Dakota Consultants

Mr. Robert Marthaller
Retired Superintendent
Bismarck, North Dakota

Dr. Cory Steiner
Superintendent
Northern Cass School District
Hunter, North Dakota

Ohio Consultants

Dr. Renee Willis
Superintendent, Richmond Heights
Willoughby Hills

Oklahoma Consultants

Dr. Robert Neel
Retired Superintendent
Norman, Oklahoma

Oregon Consultants

Dr. Robert Clark
Superintendent
Milton-Freewater, Oregon

Pennsylvania Consultants

Dr. Marjorie Alexander Wallace
Retired IU Director
Waterford, Pennsylvania

Dr. Candis Finan
Retired Superintendent
Matamoras, Pennsylvania

South Dakota Consultants

Mr. Jack Broome
Retired Superintendent
Burke, South Dakota

Dr. Henry Kusters
Retired ASBSD Asst. Executive Director
Pierre, South Dakota

Dr. Robert Mayer
Retired Professor
Sioux Falls, South Dakota

Dr. Augustine (Gus) Scully
Professor
South Dakota State University
Rapid City, South Dakota

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Retired Superintendent
Thompson's Station, Tennessee

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Dr. Donald Mathis
Educational Consultant
Cypress, Texas

Virginia Consultants

Dr. Scott Jefferies
Superintendent
Wytheville, Virginia

Washington Consultants

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Vancouver, Washington

Dr. Nathan McCann
Superintendent
Ridgefield, Washington

Mr. Michael Parker
Retired Superintendent
Orondo, Washington

Mr. Richard Parker
Former Board Member
Mukilteo, Washington

Mr. Richard Stewart
Superintendent
Ferndale, Washington

Wisconsin Consultants

Dr. Brian Busler
Superintendent
Oregon, Wisconsin

Dr. Brian Hanes
Retired Superintendent
Oostburg, Wisconsin

Mr. Damian La Croix
Superintendent
Suamico, Wisconsin

Dr. Melissa Thompson
Superintendent
Swallow School District
Hartland, Wisconsin

Wyoming Consultants

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

Dr. Chuck Grove
Retired Superintendent
Pinedale, Wyoming

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>				
	Tucson Unified School District--General	Tucson	2015/16	48,000
	Tucson Unified School District--Internal Auditor	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
	Sunnyside Unified School District No. 12	Tucson	2014/15	17,400
	Liberty Elementary School District	Buckeye	2017/18	3,500
	Salt River Schools--Dir. of Human Resources	Scottsdale	2017/18	1,000
<u>Arkansas</u>				
	Van Buren School District	Van Buren	2014/15	5,900
	Marion School District	Marion	2016/17	4,113
	Jacksonville-North Pulaski School District	Jacksonville	2014/15	4,000
	Pine Bluff School District	Pine Bluff	2015/16	4,000
	Hot Springs School District	Hot Springs	2014/15	3,689
	Batesville School District	Batesville	2016/17	3,372
	Harrison School District	Harrison	2016/17	2,800
	Watson Chapel School District	Pine Bluff	2014/15	2,721
	Star City School District	Star City	2015/16	1,645
	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
	Harrisburg School District	Harrisburg	2017/18	1,300
	McGehee Public Schools	McGehee	2016/17	1,186
	Smackover-Norphlet School District	Smackover	2018/19	1,150
	Newport School District	Newport	2018/19	1,100
	McCrary School District	McCrary	2018/19	665
	East End School District	Bigelow	2017/18	650
	East End School District	Bigelow	2014/15	622
	Magazine School District	Magazine	2014/15	520
	Foreman School District	Foreman	2017/18	509
	Concord School District	Concord	2018/19	440

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>California</u>			
Elk Grove Unified School District	Elk Grove	2014/15	62,000
Glendale Unified School District	Glendale	2015/16	26,200
Hemet Unified School District	Hemet	2015/16	21,000
Conejo Valley Unified School District	Thousand Oaks	2014/15	19,500
Ventura Unified School District	Ventura	2016/17	17,000
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
El Monte Union High School District	El Monte	2014/15	9,500
Alisal Union School District	Salinas	2015/16	9,000
Calexico Unified School District	Calexico	2017/18	8,966
Benicia Unified School District	Benicia	2014/15	5,000
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	2017/18	3,435
Nevada Joint Union High School District	Grass Valley	2017/18	2,600
Golden Valley Unified School District	Madera	2017/18	1,950
Anderson Union High School District	Anderson	2018/19	1,800
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
Lakeside Union School District	Bakersfield	2014/15	1,310
Sonora Union High School District	Sonora	2017/18	1,000
Pollock Pines Elementary School District	Pollock Pines	2015/16	800
Newcastle Elementary School District	Newcastle	2014/15	796
Penn Valley Union Elementary School District	Penn Valley	2014/15	700
Sausalito Marin City School District	Marin City	2015/16	524
Sierra-Plumas Joint Unified School	Loyalton	2018/19	425
Fort Sage Unified School District	Herlong	2016/17	310
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
<u>Colorado</u>			
Thompson School District R2-J	Loveland	2017/18	16,000
Morgan County School District	Fort Morgan	2017/18	3,300
Clear Creek School District RE-1	Idaho Springs	2018/19	765

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>Georgia</u>			
Troup County School System	La Grange	2018/19	12,300
<u>Idaho</u>			
Coeur d'Alene Public Schools	Coeur d'Alene	2016/17	11,000
Lake Pend Oreille School District	Ponderay	2018/19	3,500
<u>Illinois</u>			
Rock Island-Milan School District #41-- Elementary Principal	Rock Island	2018/19	6,300
East Dubuque School District #119	East Dubuque	2015/16	718
Scales Mound Community Unit School District	Scales Mound	2014/15	245
<u>Iowa</u>			
Waukee Community School District	Waukee	2018/19	11,000
Marshalltown Community School District	Marshalltown	2015/16	5,085
Ottumwa Community School District	Ottumwa	2015/16	4,595
Western Dubuque Community School District	Farley	2014/15	2,991
Marion Independent School District	Marion	2018/19	1,932
Webster City Community Schools	Webster City	2017/18	1,800
Center Point-Urbana Community School District	Center Point	2015/16	1,543
West Liberty Community School District	West Liberty	2016/17	1,307
Cedar Rapids Community School District	Cedar Rapids	2016/17	1,300
Clear Lake Community School District	Clear Lake	2015/16	1,200
PCM Community School District	Monroe	2014/15	1,100
Monticello Community School District	Monticello	2015/16	1,096
West Burlington Independent School District	West	2018/19	1,000
Cherokee Community School District	Cherokee	2014/15	940
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
North Cedar Community School District	Stanwood	2015/16	800
MMCRU Schools (Marcus Meridian Cleghorn)	Marcus	2017/18	800
Colfax-Mingo School District	Colfax	2014/15	746
North Kossuth CSD & North Union CSD	Swea	2015/16	743
Ogden Community School District	Ogden	2017/18	700
AGWSR Community Schools	Ackley	2017/18	624
PCM Community School District--Principal	Monroe	2014/15	

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>Kansas</u>			
Lawrence Public Schools USD 497	Lawrence	2015/16	11,716
Lansing Unified School District 469	Lansing	2015/16	2,600
Ottawa USD 290	Ottawa	2017/18	2,386
Independence USD #446	Independence	2014/15	2,000
Chapman USD 473	Chapman	2015/16	1,065
Burlington USD 244	Burlington	2015/16	854
Caney Valley USD #436	Caney	2014/15	810
Wellsville USD 289	Wellsville	2017/18	782
Lyndon USD 421	Lyndon	2016/17	400
Stafford USD 349	Stafford	2016/17	200
<u>Mississippi</u>			
Jackson Public Schools	Jackson	2017/18	27,062
Madison County School District	Ridgeland	2017/18	13,225
Gulfport School District--Middle School	Gulfport	2018/19	5,500
Starkville Oktibbeha Consolidated School	Starkville	2016/17	5,200
<u>Missouri</u>			
Hazelwood School District-Director of	Florissant	2018/19	18,000
Hazelwood School District--Director of Finance	Florissant	2018/19	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
<u>Montana</u>			
Shepherd School District #37	Shepherd	2016/17	750
<u>Nebraska</u>			
Learning Community of Douglas and Sarpy Counties--CEO	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
Fairbury Public Schools	Fairbury	2014/15	901
Broken Bow Public Schools	Broken Bow	2014/15	810
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
Centura Public Schools	Cairo	2017/18	486

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>Nebraska (continued)</u>			
Yutan Public Schools	Yutan	2014/15	477
Doniphan-Trumbull Public School	Doniphan	2017/18	465
Superior Public Schools	Superior	2017/18	435
Southern Public Schools	Wymore	2016/17	395
Pawnee City Public Schools	Pawnee City	2015/16	297
Axtell Community School	Axtell	2016/17	264
Creek Valley Public Schools	Chappell	2014/15	252
Potter-Dix Public Schools	Potter	2014/15	191
<u>New Hampshire</u>			
Manchester School District	Manchester	2018/19	13,803
<u>New Jersey</u>			
Colts Neck Township Schools	Colts Neck	2014/15	969
Harding Township School	New Vernon	2014/15	330
Unity Charter School--Director of Schools	Morristown	2014/15	205
<u>New Mexico</u>			
Carlsbad Municipal Schools	Carlsbad	2016/17	6,410
<u>North Carolina</u>			
Charlotte-Mecklenburg Schools	Charlotte	2015/16	145,363
Dare County Schools	Nags Head	2016/17	5,500
<u>Ohio</u>			
Indian Hill Exempted Village School District	Cincinnati	2018/19	2,000
<u>Oklahoma</u>			
Seminole Public Schools	Seminole	2019/20	1,700
<u>Oregon</u>			
Bend-La Pine Schools	Bend	2014/15	17,300
Reynolds School District	Fairview	2017/18	11,200
Springfield Public Schools	Springfield	2018/19	10,700
North Bend School District	North Bend	2018/19	2,300
<u>South Carolina</u>			
Jasper County School District	Ridgeland	2015/16	3,000

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>South Dakota</u>			
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
<u>Utah</u>			
Park City School District--Chief Academic	Park City	2018/19	4,700
Park City School District--Chief Operations	Park City	2018/19	4,700
Park City School District--Director of Talent	Park City	2018/19	4,700
<u>Virginia</u>			
Culpeper County Public Schools	Culpeper	2014/15	8,001
<u>Washington</u>			
WSSDA--Executive Director	Olympia	2015/16	
Seattle Public Schools--Director of Enrollment	Seattle	2014/15	52,999
Clover Park School District	Lakewood	2018/19	12,885
Tahoma School District No. 409	Maple Valley	2017/18	8,200
Tumwater School District	Tumwater	2014/15	6,700
Longview School District No. 122	Longview	2014/15	6,320
Shelton School District	Shelton	2014/15	4,115
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
Tonasket School District	Tonasket	2014/15	1,200
Chimacum School District	Chimacum	2014/15	1,100
Mabton School District	Mabton	2017/18	1,000
Coupeville School District	Coupeville	2017/18	980
Kalama Schools	Kalama	2014/15	950
Chief Leschi Schools	Puyallup	2014/15	890
Chewelah School District	Chewelah	2017/18	815
San Juan Island School District	Friday Harbor	2014/15	750
Quilcene School District	Quilcene	2017/18	650
Kittitas School District	Kittitas	2014/15	600
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
Brighton School (Nobel Learning Comm.)-- Head of Schools	Mountlake Terrace	2018/19	383
Kittitas School District--Secondary Principal	Kittitas	2014/15	350

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>Washington (continued)</u>			
McCleary School District	McCleary	2017/18	325
McCleary School District (grades PreK-8)	McCleary	2014/15	290
Kittitas School District--Elementary Principal	Kittitas	2014/15	250
Crescent School District	Joyce	2015/16	250
Thorp School District	Thorp	2017/18	170
Wishkah Valley School District	Aberdeen	2014/15	140
Skykomish School District	Skykomish	2015/16	45
<u>Wisconsin</u>			
West Bend School District	West Bend	2017/18	6,909
DeForest Area School District	DeForest	2015/16	3,625
School District of Fort Atkinson	Fort Atkinson	2016/17	2,900
Clinton Community School District	Clinton	2014/15	1,101
Bristol School District No. 1	Bristol	2015/16	770

**Eagle Point School District
Superintendent Search 2019/2020
September 5, 2019**

**Joint Proposal
(Oregon School Boards
Association & NextUp
Leadership)**



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Recruiting • Training • Assessment • Facilitation

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September 5, 2019

Dan Hodges, Board Chair
Eagle Point 9 School District
PO Box 548
Eagle Point, Oregon 97524-0548

Re: Superintendent Search – 2019/2020

Dear Dan Hodges and Board of Directors,

INTRODUCTION

We are submitting this Proposal to the Eagle Point School District Board for a superintendent search with the position beginning work on July 1, 2020. This proposal is jointly submitted by **Oregon School Boards Association (OSBA)** and **NextUp Leadership** to work collaboratively to provide the search services. For this search OSBA would take the lead and NextUp Leadership will provide support services. While we have included information about our search services, prior searches and what the Eagle Point School District search might include, we want to emphasize that each of our executive searches can be customized to meet the District's needs and maximize use of the District's resources.

We are a team of educational search consultants organized together for superintendent and administrator searches. During the 2017-18 search season, we joined forces with NextUp Leadership to provide more comprehensive services to school districts for some searches. This year we are taking the joint effort further. We will merge our strengths to ensure that you find the right educational leader for your school district.

OSBA has a long history of providing an array of comprehensive services to its members – Oregon school boards. In addition to the search process, OSBA can provide customized services to support the new leadership team – Board and Superintendent. NextUp Leadership brings outstanding marketing and recruiting skills to the search process as well as a proven process for successful hires. We have a database of over 25,000 educators with whom we communicate on a regular basis about job vacancies in the Pacific Northwest. This direct, active marketing strategy has created a type of social community and produced some of the highest quantity and quality candidate fields in the state of Oregon over the last several years.

For this search **Steve Kelley** of OSBA and will be the lead consultant with **Sarah Herb** of OSBA, **Greg McKenzie**, **Mike Taylor** and **Milt Dennison** of NextUp Leadership providing support where needed. During the search you may be introduced to other members of our search team, as needed. Biographies for each consultant on our search team are enclosed. Even though you will enjoy the benefits of two experienced executive search agencies, the cost of the search will not increase. Annually, together we assist with searches for about 15-20 superintendent and other administrator positions in Oregon.

Our fundamental beliefs about a successful executive leadership searches revolve around three core principals – Relationships, Recruiting, and Results.

RELATIONSHIPS

Successful searches are not the result of having a remote headquarters in a big city in another state. On the contrary, superintendent searching is about local connections and networks. Building a strong relationship with relevant stakeholder groups is a key characteristic of our success in superintendent searches. We focus on:

- Community, staff and student engagement to develop the search criteria
- Frequent and thorough coaching, training, facilitation and reporting with the Board
- Strict attention to candidate confidentiality to safeguard their current positions
- Involving staff and community in appropriate search activities asking for their advice
- OSBA provides board development/training to follow up after the search
- Simply, working harder than other search organizations

Our philosophy about superintendent searches is slightly different from other search firms and associations. Basically, we want to become the District's search partner, not just serve as consultant and supervise a process - a subtle, but important difference in our working relationship. Together we look for the right candidate.

RECRUITING

Here's where we differ significantly from other search organizations and national search firms. We do not just bring forward to the Board a group of our favorite candidates/applicants who have signed up with the firm to find a job. Instead, we reach out by e-mail messages directly to the computer screens, tablets and smart phones for over 25,000 superintendents, school administrators, and education college faculty across the country, with heavy emphasis on the western United States. This method of communication and marketing for positions has proven to be enormously successful. We also take full advantage of today's electronic social media to recruit candidates. Oh, yes, and we also advertise and recruit regionally and nationally in a more traditional sense by posting on online educator job boards. Not only do we passively recruit by posting/advertising the position, but we also actively recruit viable candidates with direct e-mail communication and telephone calls.

RESULTS

Our method of recruiting has resulted in candidate fields significantly larger than our competition and we deliver to the Board all qualified applications for review, not just a selected few. We report actual applications and not merely candidates who expressed interest or submitted an inquiry. Over the past 5 years the average-size search fields for districts looking for a full-time superintendent has ranged from 25-34 applicants for each position. If working together we don't find a suitable fit for your district in the initial candidate field, we simply keep working the project until someone acceptable is found.

Combined our search experience for Oregon school superintendent searches is unmatched. OSBA has conducted over 500 executive searches for school districts, education service districts, community colleges and other state agencies since 1984. NextUp Leadership has conducted over 150 superintendent and school administrator searches over the last ten years. **We know and serve the state of Oregon better than anyone in the business.** We are committed to your success!

TRANSITION PLAN

Because the first year is so critical for setting the tone of professional relationships, OSBA, in conjunction with Confederation of Oregon School Administrators (COSA), provides a unique collaboration designed to support the Superintendent and Board. OSBA will meet with you and your new chief executive to:

- a) Review your district's vision, mission and goals (strategic plan) with the new Board and Superintendent team;
- b) Design effective communication and PR strategies designed to introduce your new executive to the community;
- c) Discuss the roles and responsibilities of the Board and Superintendent;
- d) Create an effective operating agreement;
- e) Establish/review the Superintendent's performance evaluation system and timeline.

PRICE

Based on the scope of work anticipated for this search, the **Basic Fee** price for a full-service Consultant supervised search as described in the Search Overview later in this Proposal is **\$12,500** which includes a standard package of advertising and up to 12 hours of professional development for the Board and new Superintendent. **Reimbursable expenses** incurred by the Consultants **are additional** which typically include travel, lodging, and meals.

Please circulate this Proposal to the Board for their consideration. We want to help find a difference-maker for your District. We're available to answer questions related to a superintendent search in general and this Proposal specifically. For addition information, please do not hesitate to ask. My contact phone number (Steve's) is 541-401-3962 (cell).

Best Regards,



Steve Kelley
Director of Board Development and Executive Searches
Oregon School Boards Association



Greg McKenzie, Search Consultant
NextUp Leadership

Section A

Proposed Search Plan



SEARCH PROCESS OVERVIEW



All searches conducted by NextUp Leadership and Oregon School Boards Association are customizable to meet the needs of the District and a specific calendar is developed in the Planning Phase to fit the District's schedule. **For illustration purposes**, a “sample” search might include the following components along with a projected general timetable that positions the District in the candidate market at the time needed for optimal exposure to prospective candidates.

Date

Activity

Planning Phase

Oct, 2019 Search organization and planning meeting with Consultant(s), Board Chair, Board Secretary (exact Date TBD – probably during group meeting dates)

- Division of responsibility
- Scope of work
- Develop draft search calendar
- Develop draft search budget
- Discuss search literature and marketing strategy
- Identify advertising/posting targets
- Prepare search forms
- Identify application requirements

Qualifications Phase

Oct - Nov, 2019 Conduct survey for candidate qualifications, criteria and candidate profile with some or all of the following groups:

- Community & business leaders
- Local government leaders
- Union leaders
- Administrators
- Teachers
- Classified staff
- Confidential staff
- Student leaders

Board meeting (public meeting - open session)

- Report results of candidate qualifications process
- Take public input on qualifications
- Board adopt qualifications
- Board adopt search calendar

Board declare position vacant
Adopt salary range (Consultant provides salary comparison)

Advertising Phase

Dec - Jan, 2020

- Consultants prepare search literature and post the position
- Open the application period
- Post notice of vacancy on District website
- Distribute notice of vacancy to direct e-mail distribution list
 - Over 25,000 educators nationwide
 - Focus distribution on Western US
- Advertise vacancy on association and search websites
 - COSA included in contract price
 - WASA included in contract price
 - LinkedIn notice to connections
 - Others as agreed with Board

Recruitment Phase

Dec - Jan, 2020

- Consultants recruit candidates
 - Distribute application packets to prospective candidates
 - Correspond with prospective candidates
 - Receive, process and organize applications
 - Board appoints screening committee
- Close application period
 - Consultant assembles applications and screening packets

Screening Phase

Jan - Feb, 2020

- Board meeting (public meeting - open session)
 - Screening group and Board training for application review
 - Begin reviewing applications (executive session)
- Continue reviewing applications individually
- Special Board meeting
 - Debrief screening results (executive session)
 - Identify interview candidates (executive session)
 - Interview training for Board (public session)
 - Organize initial candidate interviews (public session)

Interview Phase

Feb - Mar, 2020

- Board meeting (executive session) (exact dates/times TBD)
- Conduct initial interviews with selected candidates
- Board meeting (executive session) (after last interview)
 - Debrief candidate interviews
 - Select finalist(s)
- Consultant notifies finalists

- Board and Consultants conduct reference checks
 - Telephone contact with references Internet searches
 - Licensure investigation
 - Organize site visits in finalists' home district
- Organize "day in the district" for finalists
 - 2nd interviews with board (executive session)

Selection Phase

Feb - Mar, 2020

- Board meeting (executive session)
 - Debrief "day in the district,"
 - 2nd interviews, ref. checks
 - Select new Superintendent

- Board negotiate contract with new Superintendent

- Announce selection of new superintendent

- Board meeting (public meeting - open session)
 - Formal contract offer to new Superintendent
 - Introduce new Superintendent

July 1, 2020

- Superintendent begins work

TBD, 2020

- Board/New Superintendent Development Workshop and Transition Plan

At the beginning of each superintendent search, a planning meeting determines the elements of the search to be included. However, a **typical search package** where the consultant takes the lead in all search activities might include the following services as a part of the Basic Fee.

- Facilitate multiple meetings by consultant with Board about
 - Planning and search calendar
 - Determining search criteria and candidate qualifications
 - Search activity training
 - Screening candidates
 - Interviewing candidates
 - Selection of next superintendent

- Community engagement to collect information for identifying search criteria and candidate qualifications with the following
 - Focus groups and telephone interviews
 - Community/Business leaders
 - Administrators
 - Teachers
 - Classified staff
 - Union leadership
 - Student leaders

 - Online questionnaire outreach
 - Design and create online questionnaire
 - Collect responses
 - Organize and analyze responses for report to Board

- Consultant's reports about
 - Results from online questionnaire
 - Criteria and qualifications recommendations for Board
 - Salary comparison information for Board's consideration
 - Progress of advertising & recruiting

- Design and prepare search literature
 - Electronic search brochure
 - Electronic e-messages
 - Notice of vacancy
 - Application forms & materials

- Advertise position vacancy by posting on job placement websites (as approved by Board)
 - COSA, WASA, CASE (OR, WA, CO administrators) included in contract price
 - Other regional and national job boards as agreed with District

- Actively recruit prospective candidates by
 - Telephone calls
 - E-messages
 - Correspondence
 - Personal contact

- Collect and organize candidate application materials
 - Online applications
 - Electronic applications
 - Mail applications
 - Personal delivery applications

- Supervise & facilitate application screening process

- Training for Board and screening committee for:
 - Screening applications
 - Interviewing candidates
 - Reference checking

- Assist District organize for
 - Candidate interviews
 - A "day in the district" for finalists
 - Reference checks, site visits, and background checks

- Prepare “draft” press releases as needed to announce various search activities and ultimately selection of new superintendent

- Facilitate a follow up Transition Plan including up to 12 hours of Board development conducted by OSBA with Board and new Superintendent

1. What are the key elements in your process?

Answer: Key elements of our search process are:

- flexibility in the process
- stakeholder involvement to build support for the selection
- spending more time in the district than other search firms
- keeping the Board involved and informed at every step
- partnering with district to maximize use of available resources
- recruiting – not just advertising the position
- sticking with the search until we find the “right fit”
- working harder for your search than other consultants

2. How is your process different than other executive search firms?

Answer: The steps in a search process for most consultants are relatively similar. However, one important difference is our commitment to your search. We are not like a Costco of search consultants where volume counts. We are more of a boutique search firm specializing in customer service. We do not simply want to find a new superintendent. We want to help you find a difference-maker who is the right fit for your district.

3. Do you prepare and mail a print brochure advertising the vacancy?

Answer: Preparing a print brochure advertising the position and promoting the school district and community is just not current reality. We have the graphics design capacity to create a first quality electronic brochure instead. In the last few years no candidates have asked for a mailed print brochure. We prepare a colorful brochure about the position and the district suitable for electronic distribution and, if necessary, print a copy onrequest.

4. How do you recruit quality candidates for the position?

Answer: The range of advertising for a vacancy posting is a part of the planning process for each search. The vacancy will be posted in a traditional manner state-wide, regionally and nationally, as the Board chooses. We have multiple options for regional and national advertising. These traditional posting opportunities include multiple diversity group job placement websites to be sure minority candidates are aware of the vacancy. But, we do more.

In addition to posting widely, we directly notify superintendents and other administrators in Oregon, Washington, Idaho, Montana, Utah, Alaska, Nevada, Wyoming, Colorado, Arizona, New Mexico, Texas, California and other states about the vacancy by electronic message. We also send the electronic messages

to the faculties for colleges of education in the western U.S and other highly regarded colleges of education. The list of direct marketing groups grows each year. Currently, we have approximately 25,000 prospective candidates and other educators in our e-messaging data base. This approach puts the availability of the position directly in front of prospective candidates on their computer screens, tablets or smart phones. Because we use an e-marketing service for the vacancy announcements, the notification can be sent multiple times and will be sent at least twice during the application period.

Unlike some other search firms, we will also directly recruit candidates who might fit the profile the board seeks for its next superintendent. We network with superintendents about other qualified candidates who we will also contact. In other words, we work the phones and e-mails.

5. What involvement will District staff have in the search process? How much time will this take away from their other duties?

Answer:

The short answer is that the search process generally takes very little of the staff's time. The work of the search process is largely an activity for the Board, consultant and Board Secretary. Since the search for a superintendent often involves candidates who need confidentiality in the early stages, keeping the application process off-site with a consultant provides the candidates some comfort that their names will not be exposed prematurely to the existing staff. However, administrators and other staff or their representatives may be involved at various stages that might include:

- communications coordination
- implementing a marketing strategy
- interviews and focus groups for desired qualities and qualifications
- participation on a committee to screen applications
- observe candidate interviews
- accompany a finalist for a "day in the district"

6. What items are usually included in "costs and expenses" related to the search?

Answer:

The amount for costs and expenses the District can expect to spend (both District and consultant combined) varies depending on the scope of advertising, the geographic location of interview candidates, and the resources the District has available to assist with the search. However, as a "general rule" for most searches, the District can expect to spend an amount equal to no more than one-half the search fee for additional costs and expenses. However, in our experience the "costs and expenses" are frequently substantially less than the general rule usually not exceeding \$2,000-\$3,500 total even for larger districts.

Typical items of expense are:

Fees for advertising/posting of vacancy
Photocopy costs and supplies
Travel expenses (mileage, meals, lodging) for consultant
Interview candidate transportation and lodging costs

7. Describe the role of the School Board in the screening/selection process?

Answer: Ultimately, the Board makes the decision about who to interview after screening the applications. However, we strongly encourage the Board to seek the advice of a screening committee whose composition might include: administrators, other staff, and parent/community representatives. An effective screening committee size might be 15-18 others in addition to the Board members.

Usually, the Board members conduct the initial interviews. Sometimes, a few members of the screening committee are observers during the interview process. Observers do not ask questions - just observe. More eyes and ears during the interviews often results in a richer discussion by the Board when narrowing the field of interviewees to finalists.

8. How will our community and staff be involved in the search?

Answer: Community and staff engagement is a vital part of a successful superintendent search. Typically, we arrange a series of meetings with community groups, staff, students and others to explain the search process. At that meeting we also solicit suggestions and comments about the characteristics sought in the next superintendent. For those unable to attend one of the meetings, we provide an online survey with the same questions. We telephone interview local business and community leaders for the same purpose. This information is presented to the Board in a consultant's report to be used when deciding the qualities and profile characteristics sought for the new superintendent. Community members and staff will often also serve on the screening committee for applicants and participate as observers for interviews. When the finalist candidates are invited to the district for a "day in the district," the community and staff will have an opportunity to interact with the finalists and report their observations.

9. How do you take advantage of technology and social media to aid in the search?

Answer: We use electronic technology when it provides effective assistance in marketing the vacant position, contributes to finding the right fit, and is user-friendly. For example, we market the vacant position taking full advantage of a multi-media approach that includes online job postings, website information, online surveys, e-marketing and social networking. However, while we sometimes accept online applications from those candidates who choose that method, we also accept applications electronically in PDF format, traditional mail/UPS/FedEx, and personal delivery of a hard copy. In this respect we are candidate-friendly. For

some searches we set up an all-electronic application screening process allowing the application reviewers to do their work at their convenience. Note: this method requires extraordinary precautions to maintain confidentiality of application materials. While this method offers more convenience, we believe much of the value of screener interaction, discussion, and questions are lost in this method. Basically, we follow a technology rule of thumb that says, “use it if it works – otherwise don’t change just because it’s new technology.”

Section B

Firm Profile & Information



Steve Kelley (OSBA)

Steve Kelley joined the **Oregon School Boards Association (OSBA)** staff in July, 2015 as Director of Board Development. He is responsible for Board training and also leads the Executive Search team. Steve has 36 years of experience in public education, including six years as superintendent of the South Umpqua School District. His career includes stops in Florida, Wyoming and New Mexico, and the last 18 years in Oregon. Steve lives in Turner, Oregon (south of Salem).

Education

Education Leadership Certification/Coursework
University of North Florida
University of Oregon
Master of Arts – Adult Education
University of South Florida
Bachelor of Science - Secondary Education
Flagler College (graduated Cum Laude)

Education Employment

2015-present Director of Board Development – OSBA
2009-2015 Superintendent – South Umpqua SD
2001-2009 Assistant Superintendent – Lebanon Community SD
2000-2001 Founding Principal – East Mountain Charter HS, AlbuquerquePS (NM)
1998-2000 Middle School Principal – Uinta County SD (WY)
1995-1998 Middle School Principal/Asst. Principal – Nassau County SD (FL)
1982-1995 Teacher of math/science – Baker & Marion County SDs (FL)

Education & Community Service

Confederation of Oregon School Administrators
Oregon Association of School Executives
OASE Funding Coalition Subcommittee
Canyonville Lions Club “Educator of the Year” for 2012
Local service clubs including Chamber of Commerce and Elks



Sarah Herb (OSBA)

Sarah Herb joined the **Oregon School Boards Association (OSBA)** staff in 2016 bringing with her a background in vocational education and public service.

Sarah graduated with degrees in Natural Resources and Watershed Management from Oregon State University. She worked as a registrar and acting assistant to the campus president at two vocational colleges, working directly with students to ensure degree completion, as well as planning graduations and other events.

At OSBA, Sarah has assisted with over 20 superintendent searches and is the event planner for OSBA’s multiple major annual statewide conferences. She believes that selecting the right educational leader for a district is one of the most important functions of a school board and is passionate about supporting and facilitating that process.

Education

Bachelor of Science – Natural Resources, Watershed Management
Oregon State University

Education Employment

2018-present	Executive Search and Events Specialist– OSBA
2016-2018	Board Development Assistant– OSBA
2013-2014	Registrar–ITT Technical Institute
2010-2013	Registrar–Institute of Technology Salem



Greg McKenzie

Greg McKenzie, is an education consultant operating under the business name of *NextUp Leadership*, providing training, facilitation, executive search and assessment services for the education community and other local governments. He can say “been there - done that” adding a touch of real world experience to his services. Greg lives in West Linn, Oregon.

Education Board Service

2013- Present	OR Association of ESDs (OAESD) (Chair 2016, 2017)
2009- Present	Clackamas ESD board member (Chair, 2010-2012, 2017)
1987- 1995	West Linn-Wilsonville SD board member
1989- 1993	Oregon School Boards Association board member
1981- 1986	West Linn SD Budget Committee member

Employment

2008- Present	Education Consultant, <i>NextUp Leadership</i> Executive searches Board development training Facilitation
2002- 2008	Board Development – Oregon School Boards Assn. Leadership training Executive searches
1977- 2002	Business, property and litigation attorney

College Instructor

2006- 2013	Adjunct Professor, Lewis & Clark College Graduate School of Education and Counseling Models of Organizational Change
2001- 2005	Adjunct Professor, Embry-Riddle Aeronautical University Business Law & Ethics Aviation Insurance Aviation Law
1999-2002	Instructor, Clackamas Community College Real Estate Law
1992-1995	Instructor, Portland Community College Real Estate Law

Education

1977 Juris Doctor (JD), Northwestern School of Law – Lewis & Clark College
1968 Bachelor of Aerospace Engineering (BAE), Auburn University

Sample National Presentations

Iowa Association of School Boards Annual Conf. – “Managing Difficult Situations Successfully”
National School Boards Assn. Annual Conf. – “A Deeper Look at ... Leadership Skills for Dealing with Difficult People” (3 hr. workshop)
National School Boards Assn. Annual Conf. – "Essential Leadership Skills for Dealing with Difficulty People" (2 – 3 hr. workshops)
Illinois Assn. of School Boards Annual Conf. – (1) "Superintendent Evaluation: The Next Generation;" (2) "Transform Difficult People into 21st Century Leaders"
AESA Annual Conference – "Superintendent Evaluation: The Next Generation"
National School Boards Assn. Annual Conf. – “A Systematic Approach to Superintendent Evaluation, Goal Setting and Board Self-Assessment”
National Rural Education Assoc. – "Superintendent Evaluation: The Next Generation"
AESA Annual Conference – “Standards Based Superintendent Evaluation”
Illinois Assn. of School Boards Annual Conference – “From Difficult People to 21st Century Leaders”
Kentucky School Boards Assn. Leadership Institute – “From Difficult People to 21st Century Leaders”

Focusing on “whatever it takes” to move an organization to its next level of success, Greg helps diagnose problems and design a plan for improvement. Experienced as a facilitator, executive search consultant, leadership trainer, and lawyer, Greg brings a unique set of skills to his work. He has been involved with education for over 30 years. He has conducted over 150 chief executive officer and other school administrator searches with a belief that “finding the right fit” is the most important criteria. As a business attorney he has organized and advised hundreds of corporations, non-profits, trusts and partnerships. As a board development trainer, he has given hundreds of presentations and workshops for local, state and national organizations. As a facilitator he has assisted community groups, boards and staffs tackle the necessary planning to improve the performance of their organization and solve seemingly unsolvable problems.



Milt Dennison

Milt Dennison has 13 years of superintendent and administrator search experience in both Oregon and Washington. He also knows what it takes to be a successful superintendent having served as a K-12 superintendent in Washington, a K-6 superintendent in Oregon and an ESD superintendent. He brings valuable on-the-ground experience to the search team. Milt lives in Oregon City, Oregon.

Education

1980 Ed.D. Educational Administration and Curriculum, Univ. of Southern California
1975 M.A. Educational Administration, California State University, Sacramento
1970 B.A. Mathematics and Physical Education, Western State

College Education Employment

2016-2017 Interim Superintendent, Columbia Gorge ESD
2004-2016 Superintendent, Clackamas Education Service District
1993-2004 Superintendent, Camas School District (WA)
1986-1993 Superintendent, Canby Elementary School District
1984-1986 Director of Curriculum & Instruction, West Linn School District
1975-1984 Middle and Elementary School Principal

College Instructor

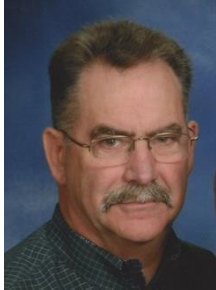
2011-2013 Adjunct Professor, University of Portland
Education Leadership Program
2006-2009 Adjunct Professor, Lewis & Clark College
Educational Leadership Doctoral Program
1986-1994 Adjunct Professor, Lewis & Clark College
Administrative Leadership, Community Relations

Education & Community Activities

Oregon Teacher Standards and Practices Commission (2007-13)
Oregon Association of Education Service Districts board member (Zone A Chair)
Cascade Council of the Boys Scouts of America board member (Senior Vice-President)
Washington State Association of School Administrators board member

Awards & Honors

American Association of School Administrators “Civic Star Award”
Camas-Washougal Chamber of Commerce “Citizen-of-the-Year”
Camas-Washougal Rotary Club “Rotarian-of-the-Year”
Washington Association of School Administrators “Award of Merit”



Mike Taylor

Mike Taylor has been superintendent for 3 different Oregon school districts: Riverdale SD; Parkrose SD; and Ontario SD spanning a period of 19 years. He also served as CEO for OBC-ACE Academy Charter School in East Multnomah County for 3 years. Mike has been an instructor at Concordia University, Graduate School of Educational Administration for several years. He was recognized as Educator of the Year by the Oregon Building Congress in 2007. Mike's superintendent experience has covered both urban and rural environments west of the mountains and east of the mountains. Mike lives in East Multnomah County, Oregon.

Education Experience

2013	Interim Superintendent Riverdale School District
2008 – 2011	Director ACE Academy (Charter School)
2007 – 2008	Education Consultant (Oregon Building Congress)
1999 – 2007	Superintendent Parkrose School District
1994 – 1999	Superintendent Ontario School District
1990 – 1994	Principal Ontario High School

College Instructor

2004 – Present	Adjunct Instructor Concordia University Graduate School of Educational Administration
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Education

1982	Oregon State University & Western Oregon State College Master's Degree in Counseling
1977	Western Oregon State College Master's Degree in Interdisciplinary Studies (Education, History, Economics)
1975	Oregon College of Education Bachelor of Science Degree in Secondary Education



“Cec” Amuchastegui

Cecelia “Cec” Amuchastegui is an education consultant whose current activities include serving as a Chalkboard CLASS Coach and Collaboration Grant Coordinator. Before becoming a consultant, she was Superintendent of Klamath Falls City Schools for 6 years. She also had a variety of other administrator positions in Klamath Falls. Cec lives in Klamath Falls, Oregon.

Education Experience

2011-Present	Chalkboard CLASS Coach; Collaboration Grant Coordinator
2004-10	Superintendent Klamath Falls City Schools
2000-04	Director of Secondary Education/School Improvement Klamath Falls City Schools
1991-95	Elementary Principal, Klamath Falls City Schools

Education

1981	MS in Education (Mental Retardation) – Oregon College of Education
1974	BS in Elementary Education – Oregon College of Education

Community Service

Board of Directors: United Way
SMART State Executive Program Committee
Board of Directors: Klamath Community College Foundation
Board of Directors: Pelican Foundation
Regional Board Member: Oregon Community Foundation

Oregon School Boards Association

Camas Valley SD – 2019 (Joint search with NextUp Leadership)

Rochelle Herberger, Board Chair – ylowmom@gmail.com; 541-430-0226

Don Wonsley, Superintendent – don.wonsley@camasvalley.k12.or.us; 541-445-2131

Days Creek SD – 2019 (Joint search with NextUp Leadership)

Troy Michaels, Board Chair – michaelsranch@frontier.com; 541-825-3760

Diane Swingley, Charter Board Chair - dswingley@citlink.net; 541-825-3352

Steve Woods, Superintendent – steve.woods@dayscreek.k12.or.us; 541-825-3296

Jefferson 14J SD – 2019 (Joint search with NextUp Leadership)

Kaye Jones, Board Chair – kaye.jones@jefferson.k12.or.us; 541-327-3514

Brad Capener, Superintendent – brad.capener@jefferson.k12.or.us; 541-327-3337

North Douglas SD – 2019 (Joint search with NextUp Leadership)

Tom Kelley, Board Chair – tdkelley@mydfn.net; 541-670-9427

Terry Bennett, Superintendent – terry.bennett@northdouglas.k12.or.us; 541-836-2223

Creswell SD – 2019 (Joint search with NextUp Leadership)

Mike Anderson, Board Chair – mikpen7@hotmail.com; 541-915-6286

Michael Johnson, Superintendent – mjohnson@creswell.k12.or.us; 541-895-6000

Cove SD – 2018 (Joint search with NextUp Leadership)

Steve McLean, Board Chair – stevemclean.dmd@gmail.com; 541-568-4256

Earl Pettit, Superintendent – earl.pettit@covesd.org; 541-568-4424

Klamath County SD – 2018 (Joint search with NextUp Leadership)

Denise Kandra, Board Chair – kandrad@kcsd.k12.or.us; 541-798-5123

Glen Szymoniak, Superintendent – szymoniakg@kcsd.k12.or.us; 541-883-5000

Mitchell SD – 2018 (Joint search with NextUp Leadership)

Miesha Bennett, Board Chair – alaskamlb@hotmail.com; 541-462-3022

Vince Swagerty, Superintendent – vswagerty@mitchell.k12.or.us; 541-462-3311

Oakridge SD – 2018 (Joint search with NextUp Leadership)

Tami Edmunds, Board Chair – tedmunds@oakridge.k12.or.us; 541-913-1600

Reta Doland, Superintendent – rdoland@ohswarriors.net; 541-782-2813

Reedsport SD – 2018 (Joint search with NextUp Leadership)

Jen Clark, Former Board Chair – jclark@reedsport.k12.or.us

Jon Zwemke, Superintendent – jzwemke@reedsport.k12.or.us; 541-271-3656

Forest Grove SD – 2018 (Joint search with NextUp Leadership)

Kate Grandusky, former Board Chair – kgrandusky@fgsd.k12.or.us; 503-359-5746

Valyrie Ingram, Board Chair – valyriewenzl@hotmail.com

Dave Parker, Superintendent, - 503-359-2427

North Marion 15 SD – 2017

Patrick McArthur, former Board Chair – Patrick.mcarthur@nmarion.k12.or.us;

Heidi Torian, Board Chair - heiditorian@yahoo.com

Ginger Redlinger, Superintendent – ginger.redlinger@nmarion.k12.or.us; 503- 678-7100

Jefferson County 509J SD – 2017

Laurie Danzuka, Board Chair – ldanzuka@509j.net

Ken Parshall, Superintendent – kparshall@509j.net; 541-475-6192

Pleasant Hill 1 SD - 2017

Wylda Cafferata, Board Chair – wyldac@gmail.com; 541-937-3114

Scott Linenburger, Superintendent. – slinenberger@pleasanthill.k12.or.us; 541-746-9646

NextUp Leadership

Central SD – 2017

Steve Love, Board Chair – 541-760-5028; slove@central.k12.or.us

Julie Sassor, Board Secretary – 503-606-2251

West Linn-Wilsonville SD - 2016

Keith Steele, Former Board Chair – 503-318-6867

Kathy Ludwig, Superintendent – 503-673-7034

Canby SD - 2015

Diane Downs, Former Board Chair – dkdowns@gmail.com

“Trip” Goodall, Superintendent – 503-266-7861

Centennial SD – 2017

Shar Giard, Board Chair - 503-666-7264

Connie Stewart, Executive Assistant - 503-760-7990

Dallas SD - 2015

Mike Blanchard, Board Chair – 503-510-4969

Michelle Johnstone, Superintendent - 503-623-5594

Coos Bay SD - 2016

James Martin – Board Member – 541-297-8115

Adrian DeLeon – Board Member - adriand@coos-bay.k12.or.us

Peggy Ahlgrim, Board Executive Secretary – 541-267-1310

Crook County SD - 2018

Doug Smith – Board Chair – 541-447-7004

Sara Johnson - Superintendent - 541-416-9962

Jan Martin – Board Secretary – 541-416-9963

OSBA

2019 (All jointly with NextUp Leadership)

Arco Iris Spanish Immersion School
Camas Valley SD
Creswell SD
Days Creek SD
Jefferson 14J SD
Newberg Public Schools
North Douglas SD
Roseburg Public Schools
Spray SD
Brookings Harbor SD (interim)
Dayton SD (interim)
Philomath SD (interim)
Silver Falls SD (interim)
Woodburn (interim)

2018

Cove SD Oakridge SD
Forest Grove SD (joint project)
Klamath County SD
Mitchell SD
Reedsport SD
South Lane SD
Days Creek SD (interim)
Jefferson SD (interim)
Wallowa SD (interim)

2017

Jefferson County SD 509J
North Marion SD
Pleasant Hill SD

NEXTUP LEADERSHIP

2018

Crook County SD
Tigard-Tualatin SD
Forest Grove SD (joint project)
Kelso SD (WA)
Churchill County SD (NV)
John Day SD
Burnt River SD
Nevada State High School (NV)
Tacoma PS (WA)
Scappoose SD

Riverdale SD
Nevada Assn of School Boards (NV)

NEXTUP LEADERSHIP (Cont'd)

2017

Ashland SD Paisley SD
Central SD Centennial
SD Pendleton SD
Prospect SD
Mosier Community School Tacoma
PS (WA)

2016

Clackamas ESD
Coos Bay SD
Pendleton SD
Port Orford-Langlois SD
Prospect SD
Reedsport SD
South Umpqua SD
Sutherlin SD
Knappa SD
West Linn-Wilsonville SD
Camas SD (WA)
Gladstone SD
OAESD

2015

Greater Albany SD
Dallas SD
Canby SD
Banks SD
Philomath SD
Brookings-Harbor SD
Roseburg SD
Knappa SD
Sisters SD

2014

Lincoln Co. SD
Perrydale SD
Fern Ridge SD
Monroe SD
Gervais SD
Three Rivers SD
Estacada SD

What Boards Have Said

“We might have thought, once our selection was made, the executive search process was over, but no, it was not. Impressively, it became clear that you wanted the board-superintendent relationship to get off on a good track and are eager to teach us processes to meet that goal. By helping us outline board expectations of the superintendent and superintendent expectations of the board, by helping us set priorities for the new superintendent’s first three months and my reviewing basic boardsmanship with us, we are on a far firmer footing than we would otherwise have been.”

Pleasant Hill School District
Enrollment: 1,000

“From the beginning, Greg’s expertise and flexibility served as a strong foundation to build a strong, customized search that was fiscally responsible, efficient and effective in attracting quality candidates for the position. Greg clearly understood the marketplace for Superintendents as well. He understood the importance of ensuring their confidentiality throughout the process- and was a true professional in standing firm to this practice.”

Hillsboro School District
Enrollment: 20,200

“I wish to thank you for facilitating a flawless superintendent search for the Philomath SD. The process was thorough, methodical, and well organized. It made the administrative effort for the School Board as minimal as possible while creating excellent community engagement. Most notably, by all measures it created an excellent result.”

Philomath School District
Enrollment: 1,700

"Everything – from beginning to end of the search was done well. Communication was great. Kept the Board Secretary and Board Chair well informed throughout the entire search process. Consultant availability for questions and quick response were excellent. Greg is truly a professional who is very knowledgeable, detail oriented, and awesome to work with. Greg knows how to be diplomatic but yet get the point across and bring the many different personalities of board members together."

Fern Ridge School District
Enrollment: 1,800

What Candidates Have Said

“After the extensive hiring process, I believe the board knows more about me than I know myself.”

New Superintendent
2017

“Thanks for your honesty. Among search consultants with whom I have worked you are clearly in the top tier. Please do keep me in mind for other openings you’re handling. I enjoyed working with you also. You may not be aware of how unique your responsiveness is.”

Nick F., Fall River, MA

Section C

Fee Structure

PRICING

Executive/Superintendent Search Services

Basic Contract Fee: \$12,500 includes:

Scope of Work services described in Contract for Services
Basic job vacancy advertising package

Reimbursable Costs & Expenses: (actual costs)

National advertising on online job boards (when agreed by District)
Mileage to & from District for meetings (462 miles x 5 estimated round trips x 0.58 IRS rate= **\$1,339.80**)
Lodging for overnight in-district visits (estimated 7 nights at \$150/night = **\$1,050**)
Meals while in-district for search activities (estimated 14 meals at \$25/meal = **\$350**)

Estimated Total: \$12,500 + \$1,339.80 + \$350 = **\$14,189.80**

Guarantee: If for any reason within the first 2 years following appointment, the selected candidate departs the position, OSBA and NextUp Leadership will assist in selecting a replacement without additional cost to the Basic Contract Fee, so long as the Scope of Work remains the same and the District has followed the recommendations of Consultants to complete the search process as outlined herein including the follow up Transition Plan.

Proposer Signature:

Signature	Director of Board Development & Executive Searches
Oregon School Boards Association	Title
Company	Date
1201 Court St NE, Suite 400	Sept 5, 2019
Street Address	Date
503-588-2800	Salem, OR 97302
Phone	City/State/Zip
skelley@osba.org	503-588-2813
Email address	Fax

SAMPLE SEARCH CONTRACT FOR SERVICES

Parties: **A. Gregory McKenzie (“Contractor”)**
Window to Leadership, an Oregon Limited Liability Company
dba **NextUp Leadership (NextUp)**
1470 Rosemont Road
West Linn, Oregon 97068

Oregon School Boards Association (OSBA) (“Contractor”)
An Oregon Non-Profit Corporation
1201 Court St., NE, Suite 400
Salem, Oregon 97301

Eagle Point School District (“District”)
Po Box 548
Eagle Point, Oregon 97524-0548

1. **Services. Contractors** mutually agree between themselves and together agree to provide Executive Search professional services to the **District**.

2. **Scope of Work.** The scope of the services provided by Contractors will include search consulting, facilitating, recruiting and transition services associated with a superintendent search with the position beginning work on July 1, 2020, including:
 - Attending meetings with the Board, staff, students, and community groups as necessary to carry out the search plan.
 - Working with the District leadership to establish a search calendar, facilitate meetings with Board, staff, students and community members to establish candidate qualities and qualifications, and establish a process to be used by any in-district candidates.
 - Preparing and distributing search forms and promotional material needed for collecting applications and advertising the vacancy both within the State of Oregon as well as regionally and nationally as agreed with the District.
 - Managing candidate applications and information; assist with screening applications; assist with organizing interviews; provide Board members with guidelines for interviews and reference checks; conduct reference checks at the Board’s request; organizing site visits when requested; and keeping applicants informed of their status during the search process.
 - Conducting a series of board/superintendent workshops (up to 12 hours of professional development conducted by OSBA) to create and execute a Transition Plan for establishing a solid foundation for the new leadership team over the first six (6) months of the new superintendent’s contract.

3. **Term.** The term of this Agreement shall begin on **October 1, 2019**, and continue until:
 completion of Scope of Work outlined above
 ending date of _____

4. **Basic Fee for Services.** District will pay a basic fee for Contractor services as follows:
 flat fee up to, but not exceeding **\$12,500.00**
 hourly rate of \$165/hr. for professional time
 hourly rate of \$70/hr. clerical support services

SAMPLE SEARCH CONTRACT FOR SERVICES

5. **Expenses.** District will reimburse Contractors for Contractors' expenses incurred while providing services on the basis of actual expenses incurred including:
- mileage (at the federal rate)
 - lodging
 - meals
 - photocopying, supplies, printing, postage & shipping costs
 - air transportation
 - ground transportation (rental car)
 - advertising/posting fees beyond basic package as agreed by District
6. **Terms for Payment.** OSBA will provide fiscal services for the performance of this Agreement. District agrees to pay billings within 30 days after invoice on the following schedule:
- One-half of the Basic Fee (\$6,250.00) upon execution of this agreement.
 - The remaining one-half of the Basic Fee (\$6,250.00) plus all applicable expenses incurred in Section 5 above will be invoiced when the search is concluded.
7. **Independent Contractor Status.**
- A. Each Contractor is an independent contractor. This Agreement shall not be construed to establish an employer-employee relationship between the District and the Contractors, including subcontractors or employees thereof. Contractors are free to contract with other parties on other matters. Contractors will not receive any benefits normally accruing to District employees unless required by applicable law.
 - B. The manner of providing these services are under sole control of Contractors, including providing all tools and equipment necessary for the performance of these services. The services provided must, however, meet the general approval of the District and shall be subject to the District's general right of inspection and supervision in order to secure satisfactory performance.
 - C. Contractors, in carrying out the services provided under this Agreement, are not employees of District, and as such accept full responsibility for any taxes or other obligations associated with payment for services under this Agreement.
 - D. None of the services covered by this Agreement shall be subcontracted without prior written consent of the District. Contractors shall be fully responsible to the District for all acts and omissions of any subcontractor, employee, agent or servant, whether employed directly or indirectly by Contractors. **Steve Kelley (OSBA), Sarah Herb (OSBA), Greg McKenzie, Mike Taylor, and Milt Dennison (NextUp)** may provide primary consulting services to District for this search.
8. **Worker's Compensation.** Contractors shall comply with state worker's compensation law for all employees who work under the terms of this Agreement. If Contractors hire employees, they shall provide District with certification of Workers' Compensation Insurance, with employee's liability in the minimum of \$100,000 upon request by District.
9. **Termination of Agreement.** This Agreement may be terminated under the following conditions:
- A. By written mutual agreement of all parties and may be immediate.
 - B. Upon ten (10) calendar days written notice by any party to the other.
 - C. Immediately on breach of contract.
 - D. Upon expiration of the term specified above.
- If this Agreement is terminated prior to the expiration date, District shall pay Contractor for services provided prior to the termination.

SAMPLE SEARCH CONTRACT FOR SERVICES


10. **Standard of Services.** Contractors agree to perform services with a standard of care, skill and diligence normally provided by a professional individual in the performance of similar services. It is understood that Contractors must perform the services based in part on information furnished by District and that Contractors shall be entitled to rely on such information. Contractors agree that the recommendations, guidance and performance of any person assigned under this Agreement shall be in accordance with professional standards and the requirements of this Agreement. District agrees not to take any action which will adversely interfere with Contractors' ability to perform to this standard.

11. **Guarantee.** Provided the District follows the steps outlined in the search process proposed by Contractors, but a new chief executive officer is not hired, or if the new chief executive officer leaves for any reason prior to completing two (2) years of service and the District has followed the Transition Plan proposed by OSBA, Contractors will conduct a new search for the cost of expenses only.

12. **Written Notice.** Any notice of termination or other communication having a material effect on the performance of this Agreement shall be served by U.S. Mail or by confirmed e-mail delivery on the signatories listed below at the addresses listed above.

It is agreed. Date: Sept 5, 2019

OREGON SCHOOL BOARDS ASSOCIATION (Contractor)



Steve Kelley, Director of Board Development and Executive Searches

It is agreed. Date: Sept 5, 2019

WINDOW TO LEADERSHIP, LLC (Contractor)
(dba NextUp Leadership)



A. Gregory McKenzie, President

It is agreed. Date: _____

EAGLE POINT SCHOOL DISTRICT (District)

Dan Hodges, Board Chair

9.B. Selection of Superintendent Search Consultant

Presenter: Mr. Hodges

10. Adjournment