

Board of Directors Meeting  
School District 4J, Lane County  
Hybrid Meeting (virtual and  
in-person)  
200 North Monroe Street  
Eugene, Oregon 97402  
Wednesday, October 16, 2024

**NOTICE:** The special board meeting will be open to the public to attend in person, via live broadcast on KRVM 1280-AM and 98.7 FM, on the internet at <https://icecast.4j.lane.edu/board> and via Zoom Webinar at <https://4J-lane-edu.zoom.us/j/91225128314>, Webinar ID 912 2512 8314

The board will not hear public testimony during the special board meeting.

**4:30 PM  
Special Board Meeting**

- I. Call Special Board Meeting to Order, Roll Call
- II. Agenda Approval
- III. **Consent Group — Items for Action**  
None
- IV. **Items for Information**
  - 1. Review of Materials and Process for Superintendent Search Firm Interviews 2  
Presenter: Judy Newman, Board Director and Ad Hoc Superintendent Search Board Committee Chair  
15 Minutes
  - 2. Interview Three Superintendent Search Firm Finalists 3  
Presenter: Judy Newman, Board Director and Ad Hoc Superintendent Search Board Committee Chair  
120 Minutes
- V. **Break**  
30 Minutes
- VI. **Items for Action**
  - 1. Select Superintendent Search Firm and Runner-Up to Move Forward with Negotiations and Contracting 78  
Presenter: Judy Newman, Board Director and Ad Hoc Superintendent Search Board Committee Chair
- VII. **Items for Action at a Future Meeting**  
None
- VIII. Adjourn Special Board Meeting

THIS MEETING WILL BE BROADCAST OVER KRVM-AM (1280)

INFORMATION FOR THE DEAF AND HARD OF HEARING:  
Closed Captioning is available during Board meetings through a zoom live feed which is also displayed at in-person meetings.



## **ITEM FOR INFORMATION**

### **Date of Meeting**

October 16, 2024

### **Title**

Review of Materials and Process for Superintendent Search Firm Interviews

### **Presenter/s**

Board Director Judy Newman, Board Director and Ad Hoc Superintendent Search Board  
Committee Chair

### **Background**

Board Directors will review search firm materials and interview questions, as well as the process that will be used to interview the superintendent search firm finalists.

### **Amount of Time Requested**

15 Minutes



## **ITEM FOR INFORMATION**

### **Date of Meeting**

October 16, 2024

### **Title**

Interview Three Superintendent Search Firm Finalists

### **Presenter/s**

Board Director Judy Newman, Ad Hoc Superintendent Search Board Committee Chair

### **Background**

Board Directors of the Ad Hoc Superintendent Search Subcommittee along with Board Director Rick Hamilton participated in the review of seven proposals submitted in response to the District's Informal Request for Proposals (IRFP) for Superintendent Search Firms for the superintendent hiring process. The review resulted in the subcommittee making a recommendation to the whole board, for three search firms finalists to move forward to be interviewed.

The recommended firms, in rank order, are:

1. Human Capital Enterprises
2. Ray & Associates
3. McPherson & Jacobson

At the October 9 Regular Board meeting, the three recommended superintendent search firm finalists were approved to be interviewed by the board as a whole. Each firm will have one-half hour to answer interview questions, with 10 minutes between each interview.

Amount of Time Requested

120 Minutes

**Interview Questions for Superintendent Search Firm Finalists**  
**October 16, 2024**

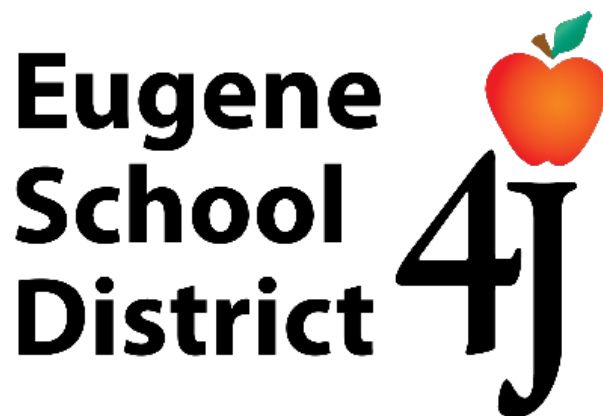
1. How do you define community engagement? Who do you consider important communities for us to engage? What are some successful strategies you've used to get community and district input and what pitfalls have you found in this arena? How do you share the information gathered through community engagement with the Board? Please provide examples.
  
2. Tell us about how your diversity, equity, and inclusion efforts impacted and improved a search you led in the last three years.
  
3. Share an example of a time when you supported a Board who had some disagreement about what they were looking for in a superintendent and how that was resolved?
  
4. Share one or two examples of how you recruited diverse and highly qualified candidates for positions.
  
5. Are there any specific qualities or characteristics related to longevity that you look for in potential candidates ? What are they? What is your firm's track record related to how long superintendents you recruit stay in the district?
  
6. Is there anything that we haven't yet covered that you would like to share with us?



HUMAN CAPITAL ENTERPRISES  
REDEFINING HUMAN RESOURCES LEADERSHIP

# Human Capital Enterprises Superintendent Search:

A Proposal for the



*Human Capital Enterprises believes it uniquely has the expertise to support the Eugene School District 4J with the highest caliber leadership and support through its upcoming executive transition. As a leading Pacific Northwest 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 strong local ties combined with our connection to the national educational leadership community allows us to bring the best candidates from across Oregon, the rest of the Pacific Northwest, and throughout the country.*

Respectfully Submitted for Consideration,  
September, 2024

## Our Commitment to Racial Equity

Human Capital Enterprises chooses to partner with boards who are unabashed in their commitment to racial equity, and in redressing the historical injustices that have been perpetuated by public institutions in the United States – including public school districts. These injustices have sometimes been intentional, and at other times they have been the byproduct of indifference or even well-intentioned ignorance. They exist in the present day, sometimes quietly and sometimes overtly.

Today's school boards and school leaders have a moral responsibility to seek out and dismantle those structures of racial injustice that exist, so that every child, regardless of race or ethnicity, is provided that which they need to succeed, and to achieve, and to live a healthy and meaningful life. We work in solidarity with, and in service to, such school boards and school leaders.

### I. Executive Summary

We are not like other Superintendent Search firms.

Human Capital Enterprises, a national firm which considers Oregon our home, is unmatched in our ability to represent Oregon on the national scene and to attract top talent to our state and our region. Although the bulk of our work is Pacific Northwest, we are widely known by educators in all fifty states – and as such we truly are a national firm. Our listserv of 40,000+ is widely read, with an unprecedented 30%+ open rate on almost all of our announcements. Our extraordinary new Salem-Keizer superintendent hails from Oklahoma; our new superintendent in Sequim hails from Maine. The semi-finalist pools in our large searches include deep regional and national talent, and board members in our partnering district time and time again confirm that they were astounded by the quality and diversity of talent that they saw in their applicant pools.

*How do we do this?* We are a widely known and trusted name across the country in superintendent searches. We have years-long relationships with educational stakeholders across the nation who take our phone calls and help point us to leaders of outstanding talent and character. Our growth is deliberate and intentional, but even in states where we do not typically conduct searches, many educators know Oregon because they know us. It is not uncommon for us to be at national conferences and be approached by a superintendent or educational leader who says – *oh, you're that group from Oregon. I read all your job announcements!* We get calls from other search firms who want to know "how we do it." We are meticulous about our work, absolutely committed to our school boards, incredibly dedicated and respectful to our candidates who are willing to "put themselves out there," and we are honored by the accolades we receive.

Our valued school board partners will routinely tell you that we have far and away exceeded their expectations in all aspects of their Superintendent Search. Our candidates, whether they are selected for a superintendency or not, routinely tell us that we bring a level of professionalism and savvy that is unmatched by other firms. We are a small, humble, and nimble firm and yet we are a significant player in Pacific Northwest superintendent searches. To serve school boards in this way is immensely rewarding, and we are honored by the accolades we receive. We do this work because we love this work.

We are the only superintendent search firm in the Pacific Northwest that is led by Human Resources professionals, which means we have spent a good portion of our careers dedicated to providing the highest level of thoroughness, integrity, fairness, and communication to the recruitment and selection process. For most of our searches, we team a former K-12 Chief Human Resources Officer with a former K-12 Superintendent. For your Eugene 4J team, you'll have two former superintendents (Christy Perry from Salem-Keizer and Kathleen Rodden-Nord from Junction City) and two former Chief Human Resources Officers (Hank Harris from Canby, Portland Public, and Bellingham and Robyn Bean from Northwest Regional ESD) who collectively have spent over 90 years in Oregon public education. We also are grateful to have a bilingual sitting superintendent in Hector Garcia on our team as well.

*Why does that matter?* No superintendent search is boilerplate. Every search has its unique characteristics, and occasional unexpected dynamics. When complexities arise, you are best served by a team of experienced K-12 leaders who are also experienced K-12 search consultants and who have collectively engaged in over 100 searches.

We see ourselves as true partners to the Board, with high investment in the outcome – ever mindful that the hiring decision rests squarely on the shoulders of the elected school board. Our commitment is paralleled by our comprehensive understanding of Oregon and a vast national network. We do our work with exceptional quality, and that is why we believe we are the most highly recommended Superintendent Search firm operating in Oregon.

It is also why districts as large as Beaverton, Portland Public, and Salem-Keizer, and as small as Bethel and Tillamook and Riverdale, look to us as their trusted partners in leadership searches. And we aim to bring that caliber of service to Eugene 4J.

## II. Experience

*Describe the capacity of your firm to perform the scope of work provided in Section Two. Describe how many superintendent searches for comparable districts your firm has completed in the last six years, and how many were in Oregon. Provide the names of the districts you provided services to in Oregon.*

We have a large and skilled team prepared to support Eugene 4J in this next leadership transition. Our superintendent searches over the last six years – both in and outside of Oregon – are listed here:

#### **Oregon Superintendent Searches (2018-2024)**

- Ashland – *Superintendent*
- Beaverton – *Superintendent*
- Bethel – *Superintendent*
- Central Point – *Superintendent*
- Dallas – *Superintendent*
- Forest Grove – *Superintendent*
- High Desert ESD – *Superintendent*
- Lebanon – *Superintendent*
- Linn-Benton-Lincoln ESD – *Superintendent*
- McMinnville – *Superintendent*
- Medford – *Superintendent*
- Portland Public – *Superintendent (2017, 2024)*
- Redmond – *Superintendent*
- Riverdale – *Superintendent*
- Salem-Keizer – *Superintendent*
- South Coast ESD – *Superintendent*
- Tillamook – *Superintendent*
- Greater Albany – *Superintendent*
- Willamette ESD – *Superintendent*

#### **Oregon Educational Executive (non-K12) Searches (2018-2024)**

- COSA – *Executive Director*
- Oregon Coast Community College – *President*
- Oregon Department of Education
  - Assistant Superintendent (two)
  - Executive Director of the EAC

#### **Other state Superintendent Searches (2018-2024)**

- Evergreen, WA – *Interim Superintendent*
- Bellevue, WA – *Superintendent*
- Richland, WA – *Superintendent*
- Port Townsend, WA – *Superintendent*
- Chimacum, WA – *Superintendent*
- Sequim, WA – *Superintendent*
- Central Kitsap, WA – *Superintendent*
- Wenatchee, WA – *Superintendent*
- Prosser, WA – *Superintendent*
- Winooski, VT – *Superintendent*

Note that searches conducted prior to 2020 were performed under the aegis of Hazard Young & Attea. Human Capital Enterprises has been fully independent since 2020.

*Share the practices and track record behind the firm's diversity, equity and inclusion efforts.*

Our practices. Our Racial Equity commitment, which you read on page 1, guides our work. As Oregon educational leaders we know how vital the battle for equity and social justice is, and therefore it is a prominent component of our conversations, our interview questions, and our selection processes. It is typically prevalent in the *Next Superintendent Criteria* or our searches because we are intentional about serving school districts whose values are aligned in this work. And our recruiting efforts are enhanced by the strong relationships we have with equity leaders – whether at the superintendent, board, or cabinet level -- across the region and across the United States.

Our practice begins by attaining a thorough understanding of the equity work in the school district and in the community with which we are partnering. We then highlight that in our outreach across the region and the nation. In the inset on p. 14, where we discuss a tremendous candidate who decided to apply for one of our recent searches, we see the results of highlighting and clarifying both the hard work of equity, and the welcomeness of a school district, in order to attract candidates of high talent who might not otherwise consider a particular role.

Our track record. As a firm, we believe our core mission includes attracting diverse leaders to superintendencies and senior staff roles in Oregon school districts. Every member of our team believes in this work and is committed to this work – and it is because we deeply love Oregon and its promise. Consequently, we know firsthand how vital this work is in our state.

We understand that our work in this regard is ongoing, and we are dedicated to continual improvement in all aspects of this work. At the same time, we appreciate that this question allows us to consider the journey ahead and to also consider some of our past successes:

*Beaverton, 2022.*

Dr. Gustavo Balderas, the AASA national superintendent of the year from 2021, was selected as superintendent from a field of incredible depth and diversity. Six of seven semi-finalists identified as BIPOC. Four presented as male; three as female. One self-identified as LGBTQ+. Of those candidates who were not selected, one is now a state superintendent of schools; one is superintendent of one of the fifteen largest school districts in the country; and two are superintendents of the largest school districts in their state.

*Bellevue 2023*

Dr. Kelly Aramaki was selected as superintendent of schools. An internal candidate – Kelly was Assistant Superintendent at the time of his application – Dr. Aramaki earnestly beat out a pool of very impressive contenders. Four of the five semi-finalists identified as BIPOC. Three

presented as female; two presented as male. One identified as LGBTQ+. Of those candidates who were not selected, two are currently serving other communities as a superintendent of schools.

#### *Salem-Keizer 2023.*

Andrea Castañeda was selected as superintendent of schools. In her short time in Salem-Keizer, under the most trying of circumstances, Ms. Castañeda has proven herself as an incredibly gifted leader and has won considerable respect internally and around the state. Andrea was one of six semi-finalists (three presenting as female; three presenting as male) of whom five self-identify as BIPOC, and one self-identifying as LGBTQ+. Three of the six semi-finalists were fluent in both English and Spanish.

#### *Portland Public, 2024.*

Portland Public's Superintendency involved a public process with three finalists, all presenting as BIPOC. Dr. Kimberly Armstrong was selected out of a pool of highly talented candidates. Of the five semi-finalists for the position, three identified as BIPOC and one was fully bilingual in Spanish/English.

*List the key staff proposed to perform the work, if contracted. Describe the role of each key staff proposed and the percentage of their time allotted to the project. Note any staff or consultants connected to the region who would be serving a role in the search.*

*For each member of the project team, please provide a description of their experience and education, time with the company, and how their experience suits their role on the team. Include experience of staff with recruitment for a position in Oregon.*

*Specify the number of superintendent searches in which each member has participated and in what capacity. Note the longevity of superintendents hired by members of this team or firm over the past six years. Describe any particularly noteworthy accomplishments of the superintendents placed.*

*Share any relevant or lived practical or cultural knowledge, beyond length or breadth of the organization's experience, that makes your firm unique in its ability to serve the District.*

In this next section, we will attempt to respond to the four questions listed above. We anticipate that Mr. Harris (up to 50%) and Ms. Bean (up to 100%) will serve as co-leads on the search. Ms. Perry (up to 100%) will play a central role as well. We anticipate Dr. Rodden-Nord (up to 25%), and Dr. Garcia (up to 25%) supporting the search, with Dr. Garcia also leading any work that is Spanish language-specific.

**Hank Harris**, Hank is well-versed in this work, well-known in the Pacific Northwest and has built a strong nationwide reputation for professionalism and expertise in public school district leadership searches. Hank spent 20 years in public education, starting his career as a high school

teacher and later serving as an administrator in various roles in Silver Falls, West Linn-Wilsonville, Santa Monica-Malibu (CA), Canby, and Portland Public Schools where he was the Executive Director of Human Resources. Hank concluded his career as a public servant by serving as Executive Director of Human Resources in Bellingham, Washington.

Hank earned his Bachelors at Harvard University and his Master of Arts in Education at the University of Michigan. Since founding HCE in 2012, Hank's work with state and national organizations has yielded a diverse national network of professional educators and education stakeholders. As President, Hank serves as lead or co-lead on most of our firm's searches. He has engaged on more than ninety superintendent and executive level searches over the last fourteen years.

**Robyn Bean** holds a BA and MS from Washington State University and University of Washington (respectively) in Speech and Hearing Science. Her educational career included work as a Speech Language Pathologist in Snohomish County Washington before relocating to Oregon and serving Beaverton, Hillsboro and NWRESD.

Robyn transitioned into special education leadership positions at NWRESD, where her work led to close collaborations with the Human Resources office, initially around the strategic recruitment of Speech Language Pathologists during a period of critical shortage. She joined the HR office in 2008, where she served as Assistant Director with a focus on recruiting for all hard-to-fill special education positions at the ESD and to establish "grow your own" opportunities for the teacher workforce. In 2012 she became the Chief HR Officer and served in that capacity for 8 years.

Robyn brought her recruiting and HR compliance/procedure/policy expertise to HCE in 2021. She has been the lead or co-lead on six superintendent searches since 2021 (Tillamook, South Coast ESD, Riverdale interim and permanent, High Desert ESD, and Forest Grove) as well as 13 Cabinet/executive level searches for K12 districts and ODE.

**Christy Perry** Christy Perry holds a BS and MS in Education from Western Oregon State College. Prior to serving nine years as Superintendent of Schools for Salem-Keizer, she was an educator in several Willamette Valley districts including Perrydale, Newberg, Woodburn, and Dallas. Her career included positions as a teacher and coordinator/consultant serving talented and gifted students. She moved into administration as a Principal, Director of Human Resources, and Superintendent in Dallas School District, before finishing her career with Salem-Keizer.

In 2021, Ms. Perry was honored to be named Oregon's State Superintendent of the Year in 2021 – and then honored nationally as one of the four finalists for National Superintendent of the Year. With an HR background and a powerful understanding of the role of the Superintendent in both small and large districts, Ms. Perry brings a unique skillset in supporting a superintendent search and communicating the needs and opportunities of Oregon districts to potential candidates. Ms. Perry joined our team earlier this year and played an integral role in our recent Portland Public Schools superintendent search.

**Dr. Kathleen Rodden-Nord** served as Superintendent of Junction City Schools in Junction City, Oregon for almost two decades. Holding a BA in Psychology from UC Davis, and both an MS and PhD in School Psychology from University of Oregon, Dr. Nord served as a school psychologist, special programs director, assistant principal, and principal - all in Junction City School District prior to her tenure as superintendent.

Dr. Rodden-Nord is a well-known thought leader engaged in impactful advocacy for public education across Oregon and has been mentoring new and aspiring Oregon superintendent for COSA since 2017. Her legislative advocacy on issues ranging from K12 funding to Diversifying the K12 workforce, to name just two areas, has connected her to leaders across Oregon and beyond. This network, and her insight about the role and experience of superintendents in Oregon positioned her for recruiting success as an HCE consultant, joining the team in 2020. Kathleen has led or co-led 5 superintendent searches (Beaverton, McMinnville, Salem-Keizer, Willamette ESD, and Evergreen's interim search) and was an associate on one (Tillamook). She has also conducted 5 executive searches for K12 districts/ESDs, for the Oregon Community College Association, Oregon Coast Community College, and for the Oregon Department of Education.

**Dr. Hector Garcia** serves as Superintendent of District 181 in Hinsdale, Illinois. In this role, he currently leads one of the highest performing K-8 school districts in Illinois as measured by student performance. A bilingual, bicultural public educator for more than 30 years, his career has included teacher, dean of students, assistant principal, director of educational services, principal, assistant superintendent, and – for the past 12 years – superintendent. He first held that position in nearby Plano, Illinois. He holds a BA in History from University of Illinois, a MA in Education from Northern Illinois University, and a PhD in Educational Leadership and Policy from Loyola University Chicago. Hector has been consulting for HCE over the past three years having worked on several searches including leading our Spanish-speaking outreach in Portland Public Schools, Bellevue, and Forest Grove.

#### Superintendent Longevity:

HCE is honored to be able to report that of the 29 superintendents hired by our partner school districts over the past seven years, 24 either still hold the position or served in that role at least five years. Only three of the 29 superintendents served fewer than five years, including one who was discharged after her board was overtaken by a slate of directors whose values were in misalignment with the superintendent's (and this search firm's) values; and one who retired early due to health matters. Our 82% longevity rate, as measured by candidates who serve either a minimum of five years or are still in their current role, is a metric that speaks to our success at recruiting candidates of top quality.

### III. Work Plan

*Provide details on the search activities and approach.*

HCE envisions certain milestones for this work with the 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.

#### *PLANNING*

HCE will engage with the Board in an open-session *Planning Meeting* which will establish the parameters and a framework for the search. We develop a strong communication plan with the Board that meets the needs of the Board collectively and individually. There are various paths a Board can take in a search, and we will walk you through them in order to arrive at a process that is best for the Board and community. We will also outline protocols that ensure a commitment to fairness and integrity in the hiring process.

As your partners in this search, we shoulder the responsibility for managing the search – which means your central office staff can rest assured that, but for a small number of events in the process, they will not be required to add to their already full plates.

#### *ENGAGING*

Community engagement is a hallmark of our work – as is learning about the dreams and aspirations of the Board Members we serve. We will meet directly with each Board member, and our team will also get to know the community by engaging with key stakeholders and conducting focus groups in both English and Spanish. There is high value in engaging as much of the community as possible, and to do this, an online survey in Spanish and English is created so that all stakeholders are able to offer input. The survey can also be adapted for other languages as well.

Most community members will engage with the process through the survey, and while this is typically received by community members and submitted back to us electronically, it need not be exclusively digital. We have come to understand that there are important voices in any school community that will not be captured by an electronic survey sent out via email, and so we will work with 4J's community outreach team to identify processes by which to capture more of those voices than we would if we limited our outreach to digital media exclusively.

Focus groups allows us to understand the 4J story at both the micro- and macro- level. Most of our focus group participants spend a significant amount of their time in 4J: namely the students and staff and parent leaders at 4J. Sometimes we also meet with key leaders such as elected officials; and sometimes we meet with individual parents selected by lottery who have individual stories to tell us which help build our understanding of both the macro- and the micro- elements of the 4J context. The Board, or a subcommittee of the Board which could include key staff, will delineate the breakdown of the focus groups.

We have a bilingual/bicultural consultant assigned to your team in Dr. Garcia. Dr. Garcia is ready and able to engage more deeply with Spanish-speaking communities if that is desirable to the Board.

Following this high-level engagement, HCE will return to meet with the Board in Open Session to present a document we call *Eugene's Next Superintendent Criteria* for the Board to consider.

### RECRUITING

In hiring a search firm, school boards not only want a trusted partner who can run a process, but who can also find exceptional talent – and in Eugene's case, to entice great leaders who match Eugene's criteria to consider this remarkable opportunity. The ability to attract candidates who may not be actively searching for a leadership role is a key hallmark of the HCE approach. Our direct email announcements are widely known by virtually every school leader in Oregon, as well as leaders across all fifty states – in fact they reach an audience of over 40,000 educational stakeholders across the country.

In addition to that, HCE reaches out to talented individuals who reflect the profile of the ideal superintendent candidate, in order to share it with individuals who might not otherwise know about the vacancy. Similarly, there are candidates who might know of the vacancy but who may not recognize that it is an ideal opportunity for them to consider. By enlisting not only our own network but our "network of networks," we are able to reach a very wide array of educational leaders from across the region and across the country. And because they typically know our name and reputation, they will be receptive to hearing about Eugene.

### SELECTION

The team will engage in multiple conversations with top prospects including a preliminary interview and preliminary reference check. In order to reduce the risk of unintended bias, all of our top-tier candidates will interact with at least three members of our team. At the conclusion of the recruitment window, Board Members will receive a confidential link in which they can view all applications and all candidate materials. HCE will then engage with the Board in a *Slate Meeting* in executive session where we will offer recommendations – including articulating a rationale regarding each recommended and non-recommended candidate. As the decision-making entity, the Board will collectively engage to determine whom to interview from any of the candidates who have applied.

Unlike most other search firms, our searches typically include four levels of interview in order to fully vet candidates:

- Preliminary Interview with Consultants
- First-Round Interview with School Board
- Confidential Community Stakeholder Interview
- Final Interview with School Board

Each of these interviews represent a set of data points on a candidate. We also coordinate a thorough system of telephone reference checks, internet searches, and a full investigative background check on finalists. By the time the Board meets with the finalists for a second time, the Board will have a significant number of data points on each of the finalists. No other search firm provides the amount of information, per finalist, that we do at Human Capital Enterprises.

#### *TRANSITION*

We will guide the Board through the finalization process, which includes various components such as the public announcement and contract development. This begins with contract negotiations, followed by an open session Board Meeting where a motion is made to appoint the new superintendent. We remain in close contact with the Board Chair and the superintendent over the ensuing weeks to ensure an appropriate transition, and we are happy to serve as a thought partner during this process at no extra cost.

*Describe how your firm would recruit for the Oregon region. Describe your understanding of what is unique or particular about education and school finance in Oregon.*

Oregon is our home. We know it better than any other national firm, as it resides profoundly in our hearts. Collectively, our team brings close to 100 years of Oregon educational experience to 4J.

We understand Oregon's educational history. We understand Oregon's opportunities and frustrations. Across our team we have professional relationships with the vast majority of Oregon superintendents over the last fifteen years. We understand the power of the promise of Oregon, and we understand the challenges – fiscal, legislative, political, structural – that school leaders, school boards, and school districts in Oregon face.

We can advise the Board on Oregon-specific issues based on our decades of history in the state. And we can speak with confidence to 4J superintendent candidates and prospects about a multitude of Oregon topics. From the SSA to the Kicker; from the impact of Measure 5 to the history of open enrollment and how they both impact today's school finance. We've testified before Oregon's legislature, written advocacy papers, and served on state legislative committees. We bring a deep personal connection to Oregon and a dedication to those who will lead its school districts.

*Provide details on methods you will use to communicate and work with the Board.*

Although each search is different, it is fair to say that in general, we develop strong partnerships with each member of the Board – and we partner frequently with the identified Board *Lead*, who is often though not obligatorily the Board Chair. There are many logistics involved in a successful superintendent search, and it is vital we have a partner at the Board level.

We are a highly communicative team. The collective board can expect to hear frequently from us. Most often, information to the Board is disseminated through the Board Lead or through the Executive Assistant. Key to all of this is a value that all Board members are in the loop and have a right to all of the information that is provided. Thus, specifically with respect to candidate information, we are careful that all candidate information is provided simultaneously to all Board members. We do not have one-off conversations with board members about candidates – and we do that specifically to ensure fairness to the process and to clarify that each Board member is an equal decision-maker.

In a typical search where there is a sitting *Interim* Superintendent, we will often consider how to best make use of the knowledge and skillset of the current leader. 4J is quite fortunate to have Interim Superintendent Gill in the role currently. (Importantly, this is typically *not* the case when there is a sitting *permanent* superintendent, who would typically not play a salient role in the search; and most sitting permanent superintendents understand the wisdom of that.)

With Superintendent Gill, we have not only an Interim Superintendent but one of the most respected educational leaders in the history of our state. His wisdom, skillset, depth of understanding, connections, and lifelong commitment to Oregon in general and the Eugene area specifically are highly valuable assets to this search. Early in the process we will engage with Superintendent Gill and the Board Lead to collaborate around his role in the process.

*Provide details on methods you will use to recruit a diverse pool, to identify prospective candidates and promote their interest to apply.*

We know that 4J is a district that values and welcomes diversity, and this is one of the many reasons we are highly interested in supporting this search. When it comes time to recruit, we will tell the story of 4J – and because 4J has such a rich history in this regard, it is a story that we know will be enticing to leaders whose lived experiences are varied and who are eager to bring unique and diverse voices to the organization.

The *Next Superintendent Criteria* is a central feature of that recruitment effort. These values will also be reflected in the marketing materials we develop, and it will be of paramount importance in the conversations we have with prospects. We are certain that 4J wants a leader who truly values and understands the fight for equity and can speak about accomplishments in this regard. We also know those very leaders are typically seeking a district such as 4J – a district that is unabashed in its pursuit of these ideals, and profoundly committed to this work.

As we described above in our Recruitment section, enlisting our “network of networks” in conjunction with a very strong marketing model is what leads us to a pool of top-drawer candidates. 4J merits an outstanding, diverse pool of candidates and we are confident that we are the right team to ensure that happens.

*Include how you would ensure that the recruitment process is equitable and accessible, particularly to candidates from communities that have been historically marginalized.*

We center our recruitment practices on equity, access and fairness. In a superintendent search, this manifests in various ways. For the sake of brevity, we'll highlight two.

1. At the initial Planning Meeting with the Board, we will ask the Board Directors to not meet with, engage with, have coffee with, or hold conversations with prospects or candidates. We ask each Board Director to individually commit to that. We do this to ensure that there are no inadvertent advantages given to candidates who might already have more access to powerful voices.

It is not unusual for a well-intentioned candidate to reach out to a Board member to request a conversation. But out of fairness for all candidates, we ask that no candidate gets unfairly advantaged by having access to a Board Member where other candidates would not. Historically, those kinds of connections – especially where a certain candidate might know someone who is closely connected with a Board member and therefore can advocate on his/her behalf – advantage some candidates, typically those who already bring a higher level of privilege to the equation. In ensuring equity for all candidates, we take pains to make sure that there are no such “legs up” afforded a certain candidate or group of candidates.

2. A second approach we take is to do our utmost to ensure that top candidates have an opportunity to engage with our team *prior* to an initial interview. Many candidates are not aware that it is acceptable (and in fact wise) to reach out to a recruiter to learn more about the organization – and those who are already aware of this are often the very candidates who already bring privilege into the system. Knowing this, we preemptively invite top candidates to engage in a videocall with us in order for them to have the opportunity to ask us questions about the role *prior* to their initial interview. We are typically thanked by such candidates who say they've never had a recruiter attend to them before in this way.

*Describe how you address implicit bias in building and screening the applicant pool.*

As recruiters for school districts in Oregon, the work of acknowledging bias is steeped within our work. Within our specifics of a search, we address implicit bias by employing a multiple perspectives approach. Our team is ethnically diverse, male and female, gay and straight. Each application will be reviewed by at least three members of the team, and often more; and each of our recommended candidates will interview with at least two members of the team.

To address implicit bias at the selection stage with the Board, we offer an implicit bias training if the Board has not recently gone through one. We also insert such a training in the orientation processes for our community stakeholder panels.

*Describe how you will assist the board in effectively engaging stakeholders (staff, students, families, and the broader community) both in terms of collecting information to develop the initial position qualifications and evaluation criteria and in providing a meaningful way to generate, receive, and use their input in the evaluation of final candidates. Describe the firm's philosophy about what role these stakeholders play in selecting a superintendent.*

On page 7 we discuss in detail the Engagement phase of the search. There are two key objectives in the Engagement phase:

- (1) to collect information in order to develop the initial position qualifications (which we call the *Next Superintendent Criteria*) and
- (2) to learn 4J as quickly and substantively as possible so that we can speak authoritatively to prospects and candidates.

The *Criteria* document, once adopted by the Board, plays a salient part in the evaluation and selection of semi-finalists, finalists, and ultimately, the selection of Eugene's next Superintendent.

How do stakeholders engage in the selection process? That is the topic of a very rich discussion we'll have with the Board in the Planning Meeting, and it can look different depending on which path the Board takes as it enters the final interview stages.

Our philosophy can be distilled to three truisms:

1. that Board Members are well-served by strongly considering the various voices of the community in the development of the *Next Superintendent Criteria*.
2. that Board Members should have high-value feedback in the selection process from a sample of community members.
3. and that the Board, and only the Board, has the statutory responsibility to select and hire the next Superintendent.

*Describe how your firm has adapted its practices, policies, and environment in light of changing notions of institutional bias and systemic oppression.*

Our firms' practices change constantly as we seek to refine our work in light of a changing world. We continue to seek better ways of engaging with the full community; to ask questions and develop protocols that seek to disrupt institutional bias and systemic oppression. We are on a journey toward this disruption, and we have not yet arrived.

We do think you will see practices that we employ that are unlike others that you have seen before. One place you will see that is in our interview and debriefing structures. Another way you'll see that is in our commitment to providing all timeline information before we begin the recruitment phase so that candidates have ample time to schedule and prepare for a future interview date. You'll also see it in the amount of quality information you receive on finalists, and you'll see it in practices such as the ones we illuminated on page 12 that seek to truly establish a search grounded in equity, access, and fairness.

*Describe the major challenges to a successful superintendent search and how the project team will address them.*

It is well known that in the current era there are fewer candidates of great talent seeking educational leadership roles. Notwithstanding that, we intend to bring to 4J a pool of exemplary candidates, and therefore it is incumbent upon all of us to think about the impediments to that goal. The good news – 4J is a wonderful school district in a highly desirable geography. Oregon is a state with an unusually strong support system for superintendents. Eugene is the perfect sized metropolis with a major university in its backyard – large enough to have an airport where you can get to and from anywhere, small enough that people know each other.

But what are the challenges? The greatest potential obstacle in any superintendent search is also the greatest opportunity – and that is the elected school board. Candidates of high talent who are serious about the role will study the press and watch each school board meeting with high interest. A Board that works well together, respectfully and collaboratively, will entice – and a board that doesn't will not. Our understanding is that this is a great moment in the history of 4J with an aligned board that governs really well together.

Another challenge in a superintendent search is ever-changing processes and timelines. Sometimes candidates apply for superintendent roles without knowing what the selection process is, or even the dates of interviews with enough lead time. In our work, that does not happen. In conjunction with the full board, we define a selection process including dates and activities prior to the start of recruitment. We ask for a full commitment from Board members – and we get that. Candidates know well ahead of time what will be expected of them including what date they will need to be onsite, should the opportunity arise. At every step in the process the candidate knows when they will hear a status update from us, and we follow through with that. In other words, we won't let that challenge be a challenge in Eugene.

Whether or not finalists' names are made public is a consideration upon which the Board will need to ponder. We will recommend that they not be made public – because that presents a challenge for attracting the widest breadth of talent into the search. There are other reasons as well which we will want to articulate at our initial Planning Meeting. However, the ultimate choice resides with the Board, and should the Board decide to implement a public reveal of finalists' names – we are well versed at executing a public process seamlessly.

*Every board is unique and has unique goals. How have you in past searches recruited candidates whose experience and skillsets align with a board’s specific goals?*

The *Eugene 4J Next Superintendent Criteria*, which will be adopted by the Board and informed by large-scale community involvement, is our marching orders for recruitment and selection. This is not a boilerplate document – rather it is a carefully created document that reflects the dreams of the Eugene community and the specific goals of the elected school board. We use this as our key recruitment tool.

*We had a candidate a few years ago for one of our larger Oregon searches who hailed from Mississippi. He was not ultimately selected for the role, but he is a leader of great talent who is currently superintendent of the largest school district in one of the Southeastern states. He had never even considered coming to Oregon until we sent him the Next Superintendent Criteria. He told us that he read it – and saw himself in that document, and believed this would be an exceptional fit for his interests, skillset, and abilities. That single-page document piqued his interest enough to get on the phone with us – and we were then able to tell him enough of the district’s story that he was sold. And were it not for the fact that we was bested by someone else of great talent, he would have likely performed exceptionally well in the role. – HH*

During the recruitment phase, prospects engage in conversations with us – either because we’ve reached out to them to encourage them to apply, or because they are serious candidates who are interested in learning more. In those phone conversations we are able to illuminate and elevate for them the *Criteria* document.

*Develop an ambitious and thoughtful DRAFT timeline that will ensure the District is well positioned to review and interview high quality candidates before they have accepted positions with other employers.*

We propose the timeline below, based on a Board selection of Superintendent Search firm in October. It is possible to expedite this timeframe, and exact dates will be determined in conjunction with the full Board in order to ensure full participation of all Directors.

Activity	Proposed Date(s)
Board Planning Meeting <i>in Open Session</i> and 1:1 Board conversations	November
Focus Group Meetings and Online Survey Window	November/December
“Pre-Announcement” e-Blast	Thanksgiving week
Presentation of Eugene’s Next Superintendent Criteria <i>in Open Session</i>	January
Recruitment Window including additional e-Blast and other Advertising	January/February
Preliminary Interviews virtual <i>with consultants</i>	February

Presentation of Slate <i>in Closed Session</i>	February/March
Board initial interviews (first round) <i>in Closed Session</i>	March
Finalist (second round) interviews <i>in Closed Session</i>	March
Boards meets to identify preferred candidates <i>in Closed Session</i>	March
Selection and Announcement	by end of March
Superintendent assumes responsibilities	July 1, 2025

*Describe the Information, services and assistance you will require from the board, interim superintendent and district staff to enable you to conduct the search.*

We appreciate this question, because one of our commitments in this work is that we do not ask District staff to shoulder the work of running the search. Rather, we shoulder the responsibility for the search, because we recognize that 4J district staff are already working as hard as they can with a very full plate of responsibilities. Let’s start by looking at staff responsibilities, followed by Board, and then Interim Superintendent Gill.

STAFF

District employees will have opportunities to offer input into the *Next Superintendent Criteria* and may also have an opportunity to be involved at the selection phase of the search. All such opportunities are voluntary.

- A. A senior staff person/executive assistant will serve as liaison and will:
  - a. be involved in the scheduling and organization of focus groups.
  - b. provide on-site support to the consultant and Board during interviews if they are in-person.
  - c. serve as a point-person throughout the search for information flow.
- B. A communications point-person will
  - a. routinely update the district’s website to provide information to community and staff.
  - b. inform the public and employees about opportunities to participate.
  - c. prepare a press release about a hire or pending hire and may be asked to work in conjunction with counterpart in other school districts. *We are also able to provide support in this area as delineated at the bottom of p. 11.*
- C. During the engagement phase, a community engagement leader(s) will oversee the outreach to communities during the engagement phase, particularly those communities who have historically been farthest away from educational justice.

## BOARD OF DIRECTORS

Collectively, the Board is the “Hiring Manager” for the new superintendent. The Board’s work involves setting the framework for the search and engaging in a highly focused way in the selection processes. During our initial *Planning Meeting*, an official timeline will be finalized in alignment with individual Board members’ schedules such that all Board members are able to commit to all individual and collective responsibilities, specifically:

- A. 1:1 interview by each Board member with HCE consultants. *Scheduled at the convenience of each Board member.*
- B. A subcommittee of the Board (which may include 1-2 senior staff members) will convene to identify the Focus Groups.
- C. Eugene’s Next Superintendent Criteria meeting. *Held in Public Session; oftentimes there are two public meetings associated with this work.*
- D. Document Review. *In preparation for item (d) below, Board members should individually set aside approximately 6-9 hours to review application materials in the days leading up to the Slate Meeting.*
- E. Slate meeting, during which semifinalists are selected. *Held in Executive Session.*
- F. First Round Interviews. *One full extended day of interviews, typically starting around breakfast time and ending after dinner.*
- G. Second Round Interviews. *Typically held on multiple consecutive afternoons, approximately 3-5 hours in duration.*
- H. Telephone Reference Checks on finalists. *We find it to be of high value for Board Members to be involved in the telephone reference checks on finalists. Any Board Member may opt out of this if they choose.*

## INTERIM SUPERINTENDENT GILL

We are excited to meet with Superintendent Gill early in the process to interview him about everything/anything related to being the superintendent of 4J. This information will be of great assistance to us, both as we learn the district deeply, and as we define a draft *Criteria*. We will also meet with him and the Board lead early in the process to collaborate around identifying his role in this process, which might fall into some or all of the following categories:

- A. Sourcing candidate names
- B. Serving as an informational resource to prospects
- C. Interviewing semi-finalists or finalists
- D. Other activities as agreed upon.

## IV. Budget

Base Fee for Comprehensive Superintendent Search (Regional) Package: \$43,500

Base Fee for Comprehensive Superintendent Search (National) Package: \$48,200

*What is the difference between a Regional Search Package and a National Search Package? The singular difference is how we focus our networking outreach. In a Regional Search, we will focus our outreach specifically to Oregon and the Pacific Northwest – including candidates who have professional experience in the region but who might no longer live here. In a national search we network across the country and beyond. In either search, any applicant is welcome to apply, and any applicant who does apply will be evaluated according to the criteria set by the Board, irrespective of where the candidate is located.*

- A. Commitments included in the Base Fee.
- a. Board Planning Meeting in Open Session.
  - b. 1:1 engagement interviews with all Board Members
  - c. Twenty 40-minute focus group engagements with small groups of constituents, held in either English or Spanish.
  - d. Coordination of community surveys in both Spanish and English. We will work with the Board to add additional languages if so desired.
  - e. Authoring draft of *Eugene's Next Superintendent Criteria*.
  - f. *Next Superintendent Criteria* Meeting with Board in Open Session.
  - g. One additional Board Meeting during the Planning Phase, typically used for Board Planning of *Criteria* adoption.
  - h. Coordinating the advertising of the vacancy.
  - i. Engaging with staff on communications and logistics.
  - j. High-level recruitment involving multiple points of contact with prospects
    - i. Researching
    - ii. Sourcing
    - iii. Attracting
    - iv. Pre-Screening
  - k. Preliminary interviews with approximately 8-12 top contenders.
  - l. Single preliminary phone reference checks on 8-12 top contenders.
  - m. Preparation of materials for Board review in advance of Slate meeting.
  - n. Slate Meeting in Executive Session
  - o. Preparation of First Round Interviews.
  - p. Coordination of First-Round Interviews including debrief and facilitation.
  - q. Preparation of Feedback from Board after First-Round Interviews
  - r. Facilitation of Board decision-making after each round of interviews
  - s. Preparation of Second-Round Interviews
  - t. Preparation and facilitation of Community Stakeholder panel
  - u. Preparation of feedback from Community Stakeholder panel
  - v. Engagement with Board and Staff around logistics of Second-Round Interviews

- w. Coordination of Second Round (Finalist) Interviews
- x. Coordination of Board-approved background-checks
- y. Coordination of Multi-point phone reference checks on all finalists.
- z. Coordination of final activities toward selection
- aa. Engagement with district counsel on final processes
- bb. High-level communication with candidates throughout the process
- cc. Engagement with press if desired
- dd. Counsel to Board Lead throughout the process including evenings and weekends.

B. Travel Expenses

a. Consultant Travel

At our Board Planning meeting we will determine which meetings are to be in-person and which are to be virtual. Consultant travel expenses will be billed as supplemental invoices within thirty days of completed travel.

b. Candidate Travel

If there are travel expenses incurred by semi-finalists and finalist candidates, they will be reimbursed by HCE and invoiced to the District at the conclusion of each set of interviews. (Note that HCE recommends that semi-finalist interviews are held virtually, which would therefore eliminate the need to reimburse for candidate travel at the semi-finalist stage).

C. Optional Other Expenses

1. Advertising agreed upon by the Board will be invoiced at cost by HCE. There is no charge for the HCE Listserv Announcement that reaches over 40,000 subscribers.
2. Comprehensive Background Check with a third-party entity in the amount of \$1700 per finalist.
3. Additional Focus Group Engagements available at \$195/session.
4. Immersive outreach to Spanish-speaking communities: TBD.
5. Implicit Bias Training: TBD.
6. A 12-member community stakeholder interview panel is included in the base fee. Coordination of, interview development, orientation, facilitation, and debriefing an additional community stakeholder panel is \$2100.
7. Other activities not covered by this contract are billed at the hourly rate of \$195/consultant and might include the following such activities: additional board meetings not listed above; planning for public finalist events; managing public finalist events.
8. Although many school boards choose to handle the superintendent search communications in-house, an add-on package is available. This includes managing the publicity and community engagement regarding the search and can include both one-way and two-way communication packages. Packages are based on district needs and are billed hourly at \$165/hr.

II. Guarantees

- A. Throughout the search process HCE will be available to counsel with identified District staff about the search.
- B. The superintendent appointed with HCE's assistance will not be presented to another Board as a candidate if it would result in the Superintendent leaving the District within four years of employment, unless the Board provides written authorization to HCE that it may do so.
- C. This search process continues under the parameters articulated in this service agreement up until the time a contract is signed between the District and a new superintendent, or through June 30, 2024, whichever is earlier. If by June 30, 2024, no suitable superintendent has been identified by the Board, HCE will continue to provide services toward the hiring of a superintendent, permanent or otherwise, at no additional Base Fee to the district through January 1, 2025.
- D. If the newly hired Superintendent departs from the position within twenty-four months of signing an employment agreement, and if a majority of the Board by vote is still in place, HCE will recruit new candidates and coordinate the selection process at no additional Base Fee.

*On behalf of Human Capital Enterprises, I thank you for your consideration.*



*Hank Harris*

*President, Human Capital Enterprises*

## ATTACHMENT A: PROPOSER CERTIFICATIONS AND REPRESENTATIONS

**FAILURE TO SIGN AND SUBMIT THIS FORM MAY BE CAUSE FOR PROPOSAL REJECTION**

**EUGENE SCHOOL DISTRICT 4J  
INFORMAL REQUEST FOR PROPOSAL (IRFP)  
Solicitation # 25-193  
Superintendent Search Firm**

The undersigned hereby certifies that Proposer:

1. Has the authority to submit a proposal and to represent the organization in all phases of this IRFP process.
2. Has submitted information that is true and accurate to the best of their knowledge and understands that any false statement may disqualify this proposal from further consideration or be cause for contract termination.
3. Is one of the following, as defined in ORS 279A.120, of the State of Oregon.
  - Resident bidder: a bidder that has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the bid, has a business address in this state, and has stated in the bid whether the bidder is a "resident bidder". (ORS 279A.120 (b))
  - Non-resident bidder: a bidder who does not meet the definition above. (ORS 279A.120 (a))  
  
ORS 279A.120 (2) states for the purposes of awarding a public contract, a contracting agency shall: give preference to goods or services that have been manufactured or produced in this state if price, fitness, availability and quality are otherwise equal; and add a percent increase to the bid of a nonresident bidder equal to the percent, if any, of the preference given to the bidder in the state in which the bidder resides.
4. Has not discriminated and will not discriminate, in violation of subsection (1) of ORS 279A.110, against a disadvantaged business enterprise, a minority-owned business, a women-owned business, a business that a service-disabled veteran owns or an emerging small business in obtaining any required subcontracts.
5. Attests in writing that they have complied with the tax laws of this state and of any political subdivision of this state for no fewer than six years preceding the date of the solicitation closing. Applicable tax laws include, but are not limited to, ORS 305.620, ORS Chapters 316, 317, and 318, any tax provisions imposed by a political subdivision that apply to the Proposer or to the performance of the Contract, and any rules and regulations that implement or enforce those tax laws.
6. Certifies to the best of its knowledge and belief that neither it nor any of its principals:
  - 6.1. Are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from submitting bids or proposals by any federal, state or local entity, department or agency;


**ATTACHMENT A: PROPOSER CERTIFICATIONS AND REPRESENTATIONS**

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- 6.2. Have within a five-year period preceding the date of this certification been convicted of fraud or any other criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contract, embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- 6.3. Are presently indicted for or otherwise criminally charged with commission of any of the offenses enumerated in paragraph 6.2. of this certification;
- 6.4. Have, within a five-year period preceding the date of this certification had a judgment entered against proposer or its principals arising out of the performance of a public or private contract;
- 6.5. Have pending in any state or federal court any litigation in which there is a claim against proposer or any of its principals arising out of the performance of a public or private contract; and
- 6.6. Have within a five-year period preceding the date of this certification had one or more public contracts (federal, state, or local) terminated for any reason related to contract performance.

7. Acknowledges Receipt of Addenda No's. \_\_\_\_\_ through \_\_\_\_\_ inclusive.

**Where Proposer is unable to certify to any of the statements in this certification, Proposer shall attach an explanation to their offer. The inability to certify to all of the statements shall not necessarily preclude Proposer from award of a contract under this procurement.**



\_\_\_\_\_  
**Signature**

Henry P "Hank" Harris, President  
\_\_\_\_\_  
**Printed Name and Title**

Human Capital Enterprises  
\_\_\_\_\_  
**Company Name**

\_\_\_\_\_  
**Street Address**

401 S El Cielo Rd, Ste 173  
\_\_\_\_\_  
**City, State, Zip**

\_\_\_\_\_  
**Phone**

Palm Springs, CA. 92262  
\_\_\_\_\_  
**City, State, Zip**

\_\_\_\_\_  
**Phone**

202.735.6665  
\_\_\_\_\_  
**Phone**

Sept 23, 2024  
\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Date**

45-4124315  
\_\_\_\_\_  
**Federal Tax Identification Number**

\_\_\_\_\_  
**Federal Tax Identification Number**

hank@humancapitalenterprises.com  
\_\_\_\_\_  
**Email**

\_\_\_\_\_  
**Email**

**ATTACHMENT B: PROPOSER REFERENCE SHEET**

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**EUGENE SCHOOL DISTRICT 4J  
 INFORMAL REQUEST FOR PROPOSAL (IRFP)  
 Solicitation # 25-193  
 Superintendent Search Firm**

*The District will attempt to contact references via phone, email, or both. If the District is unsuccessful in contacting any of your references or if it does not receive a response from any reference after three (3) attempts, your proposal may receive a lower score or be rejected. You are encouraged to notify your references that they may be contacted by the District.*

The number of references required by this solicitation is 3.

<b>REFERENCE 1</b>	
<u>Ashland School District</u>	
Name of Company <u>Rebecca Dyson (Board Chair)/ Jill Franko (Board Vice-Chair)</u>	
Contact Name and Title <u>503.261.1610 / 707.495.0896</u>	<u>rebecca.dyson@ashland.k12.or.us jill.franko@ashland.k12.or.us</u>
Phone <u>2023-2024 School Year</u>	Email <u>26,400 + Communications contract of approx 4500</u>
Contract Start & End Date	Contract Amount
Description of Services or Items Provided: Superintendent Search	

<b>REFERENCE 2</b>	
<u>Portland Public Schools</u>	
Name of Company <u>Eddie Wang, Board Chair</u>	
Contact Name and Title <u>971.419.1006</u>	<u>eddiewang@pps.net</u>
Phone <u>January to June 2024</u>	Email <u>79,000 + 12,000 Communications contract</u>
Contract Start & End Date	Contract Amount
Description of Services or Items Provided: Superintendent Search	

**ATTACHMENT B: PROPOSER REFERENCE SHEET**

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**REFERENCE 3**

**Salem-Keizer School District**

---

Name of Company

Ashley Carson Cottingham, Board Chair (2022-23)

---

Contact Name and Title

202.557.8364

---

CarsonCottingham\_Ashley@salkeiz.k12.or.us

---

Phone

2022-23 School Year

---

Email

41,600

---

Contract Start & End Date

Contract Amount

Description of Services or Items Provided:

Superintendent Search

**Reference 4**

**Beaverton School District**

Becky Tymchuk, former Chair

beckytymchuk@gmail.com

503.720.5852

2021-22 school year

Superintendent Search

Contract Amount: 38,175

# *Response to IRFP Solicitation #25-193 - Executive Search and Recruitment Services for Superintendent of Schools*

*Presented To:*



*Submitted By:*



**Contact:** Kathy Schoenfelder, Coordinator of Leadership Acquisitions

**Address:** 901 17<sup>th</sup> Street NE, Cedar Rapids, IA 52402

**Phone Number:** 319-393-3115

**Email:** [kathy@rayassoc.com](mailto:kathy@rayassoc.com)

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901 17th Street NE  
Cedar Rapids, IA 52402



Phone: 319-393-3115  
Email: [kathy@rayassoc.com](mailto:kathy@rayassoc.com)  
Website: [www.rayassoc.com](http://www.rayassoc.com)

September 19, 2024

Dustin Hayden, Purchasing Analyst ([solicitations@4j.lane.edu](mailto:solicitations@4j.lane.edu))  
Eugene School District 4J  
200 North Monroe Street  
Eugene, OR 97402

Dear Mr. Hayden:

Thank you for your interest in learning more about how Ray & Associates can assist you in the search for a Superintendent. We have been highly successful in providing Superintendent search services for Districts that are similar to yours in terms of size, cultural diversity and geographic location and would welcome the opportunity to do the same for you.

As I am sure you are aware, the selection of a 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. As a national and proven search firm, we are uniquely qualified to develop and execute a talent acquisition strategy tailored to your district's needs. Our professional, objective procedures allow us to attract, process and screen the most successful candidates for your Superintendent position.

In Oregon we have conducted searches for the North Clackamas School District, Lake Oswego School District, Gresham-Barlow School District, Salem-Keizer Public Schools, Medford School District 549C, among others. Additionally, we assisted Eugene School District 4J with its Superintendent search in 2011.

Our reputation for success is proven, long-standing, and built upon providing school districts with precisely the type of candidate that satisfies not only the Board but the community and staff as well. 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 that reads "Kathy Schoenfelder". The signature is written in a cursive style.

Kathy Schoenfelder, Coordinator of Leadership Acquisitions  
Phone: 319-393-3115  
[kathy@rayassoc.com](mailto:kathy@rayassoc.com)  
Website: [www.rayassoc.com](http://www.rayassoc.com)

## WHO WE ARE

Ray and Associates, Inc. is capable of meeting all requirements set forth in the Scope of Services. With over 45 years in the industry (longer than any other firm), the strength of our search teams as well as our extensive search experience nationwide, we understand the search process necessary for your district to follow to be successful.

In addition to our foundational commitments to diversity, equity and inclusion, candidate care and legitimate community engagement, the following practice set us apart:

- Our unique all-inclusive pricing structure includes foreign language assistance for all community engagement efforts at no additional cost; a 2-part candidate screening process, as well as our two-year and five-year guarantees.
- The diversity of our associates provides different perspectives as we recruit, screen and vet candidates thereby allowing us to have recruited and placed more women and minorities than any other firm.
- Our expansive quality client reach and our extensive district profile building process and subsequent candidate to profile pairing process enables the size and authenticity of the presented candidate pool to be extensive and congruent with the district's educational leadership needs.

## WHAT WE DO

Ray & Associates is an independent and objective firm that does not accept placement fees from candidates. Our procedure allows us to impartially assist schools in selecting the best individual for their particular needs. You will also find our system is flexible, which allows us to customize the search to meet the desires of the Board.

Our professional, objective procedures allow us to attract, process and screen the most successful candidates for a Superintendent position.

## HOW WE WORK

*What makes us stand out from the crowd? **Our people.*** Our professional consultants, located across the US, are individuals with diverse backgrounds and long-term experience in the educational executive search field. From backgrounds as school administrators, business executives, school board members and university professors, our team brings a wide range of lived experiences and perspectives to the table.

In addition to our Associates, our corporate office in Cedar Rapids, Iowa *maintains a full-time and experienced administrative staff* to assist in the executive search business.

### Experience

## OUR EXPERIENCE

With over 45 years in business, our firm and team have the capacity to perform all of the tasks shown in the Scope of Work and have no known conflicts.

Our firm has completed approximately fifty (50) searches (with enrollment comparable to Eugene or higher) in the last six years three (3) of which were in Oregon with those districts being North Clackamas School District, Lake Oswego School District and Gresham-Barlow School District.

large enough to accommodate any search at any given time; each at various stages in the process. This ensures potential candidates and our clients that we are quite active in the search business, which is necessary to be successful. We have never had complaints about priority issues as we have the capacity to handle each search with the utmost attention

## PRACTICES AND TRACK RECORD BEHIND DIVERSITY, EQUITY AND INCLUSION EFFORTS

Our goal is to provide the Board with a diverse pool of candidates whether that diversity is by nationality, experience, education, etc. and we have had great success doing that. With searches conducted over the past 5 years, 49% of the candidates placed were people of color with 30% of those being women. Ultimately, our goal is for the Board to find the “right fit” not just “any fit”.

## THE TEAM

The individuals who make up the Ray & Associates team bring *years of experience* and a depth of expertise unmatched in our industry. Our collaborative group of entrepreneurs, advisors and recruiters all have *significant experience in the school executive search field* and *extensive backgrounds in school administration, business, and law*. Our professional staff emphasizes confidentiality, ethical business practices, and professional standards for both the client and the candidates

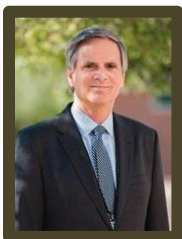
## KEY ASSOCIATES

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 Eugene School District 4J. In addition, we have professional contacts throughout Washington and nationally. **Our team takes pride in becoming familiar with each district in which we work as well as the stakeholders in the district. We encourage honest thoughts and feedback on things taking place in the district.**



### **Ms. Libra Forde, Regional Search Associate, Damascus, Oregon**

Libra serves our firm as a Regional Search Associate, team member and background investigator and as such performs recruiting and screening of candidates having joined the firm 2 years ago. She received a Bachelor of Arts from Brandeis University and a Master of Business Administration from the University of Phoenix. She has over 25 years of educational advocacy experience in Hawaii and Oregon. **She was President of the North Clackamas School District Board of Education when our firm conducted their Superintendent search and currently serves on the Oregon State Board of Education. Was a team member on search for North Thurston Public Schools, WA. With her experience in Oregon education, Libra will be a strong advocate for Eugene School District 4J. Currently, Libra is not working on any other searches.**



### **Dr. Steve Chestnut, Team Member, Scottsdale, Arizona**

Steve serves our firm as a Regional Search Associate, team member and background investigator and as such performs recruiting and screening of candidates having joined our firm over 4 years ago. He received a bachelor's in history and education from Pacific Lutheran University, a M.B.A. in Business Administration from City University of Seattle, a M.Ed. in Curriculum/Supervision from Central Washington University and his Ed.D. in Educational Leadership from Seattle University. He was a Superintendent in Washington State for over 20 years and is a previous Washington Superintendent of the Year. He also served as a Superintendent in Arizona for 6 years. **Worked on North Thurston Public Schools, WA and ESD 123, WA Superintendent searches in addition to many in Arizona. While Steve has not had experience on our past**

Oregon searches, he and Libra have teamed together before. Additionally, he has a unique perspective in that before he was our associate, he was a candidate, so he is familiar with both sides of our search process. Steve will begin working on an Arizona search, but there would be no conflict with the timeline for that search and the timeline for this search.



**Dr. David Faltys, Director of Leadership Acquisitions, Dallas, Texas**

David serves our firm as a Director of Leadership Acquisitions, team member and background investigator and as such performs recruiting and screening of candidates having joined the firm 4 years ago. He is a graduate of Texas A&M University where he earned his doctorate degree. He is a former classroom teacher, coach, high school principal and assistant superintendent and superintendent in Navasota ISD. David retired as the Superintendent of Carroll ISD in December 2020 having served since January of 2006. Considered one of the premier districts in the state of Texas, Carroll ISD is a suburban public school district that serves 8,300 students and more than 1,000 employees. David is the second most tenured Superintendent in CISD history. In 2010, he was named Region XI Superintendent of the Year. He was nominated for this honor by the seven members of the Board of Education. He spent 33 years in public education, the last 18 years of which he served as a Superintendent. **Managing Director on search for North Thurston Public Schools, WA in addition to many others in other regions.** While David has not had experience on our previous Oregon searches, he has a unique perspective in that before he was our associate he was a candidate with our firm, so he is familiar with both sides of our search process.



**Dr. Bob McDowell, CESO Vice President of Leadership & Organizational Health**

A new addition to our search team, Dr. Bob McDowell has coached leaders since 2015, bringing the unique perspective he gained through his time as assistant principal, principal, assistant superintendent and superintendent. He's taught graduate-level education courses for St. Mary's University and Bethel University as well as advised doctoral students and superintendent licensee candidates. He was the 2012 MASA Principal of the Year and the 2018 Outstanding Central Office Administrator of the Year.

## AVERAGE TENURE AND NOTEWORTHY ACCOMPLISHMENTS

The average tenure of Superintendents placed by our firm over the past six years is approximately 4-5 years with several of our candidates placed being named Superintendent of Year in their respective states as well as being published authors and sought after public speakers.

## RELEVANT OR LIVED PRACTICAL OR CULTURAL KNOWLEDGE

At Ray and Associates, our extensive experience working with boards spans over several decades, providing us with a deep understanding of the unique dynamics and challenges boards face. This knowledge goes beyond mere years of service; it's about the practical and cultural insights we've gained while working with diverse boards across the country. One of the key elements that sets us apart is our ability to tailor our approach to each district's unique needs, ensuring every board we work with is empowered to make decisions that truly reflect their community's values and priorities.

What makes our firm particularly unique in serving your district is the lived experience and personal connection of our consultants. This experience allows us to integrate both historical context and firsthand cultural knowledge into our approach, making our recommendations and strategies not just theoretically sound but practically aligned with your specific needs.

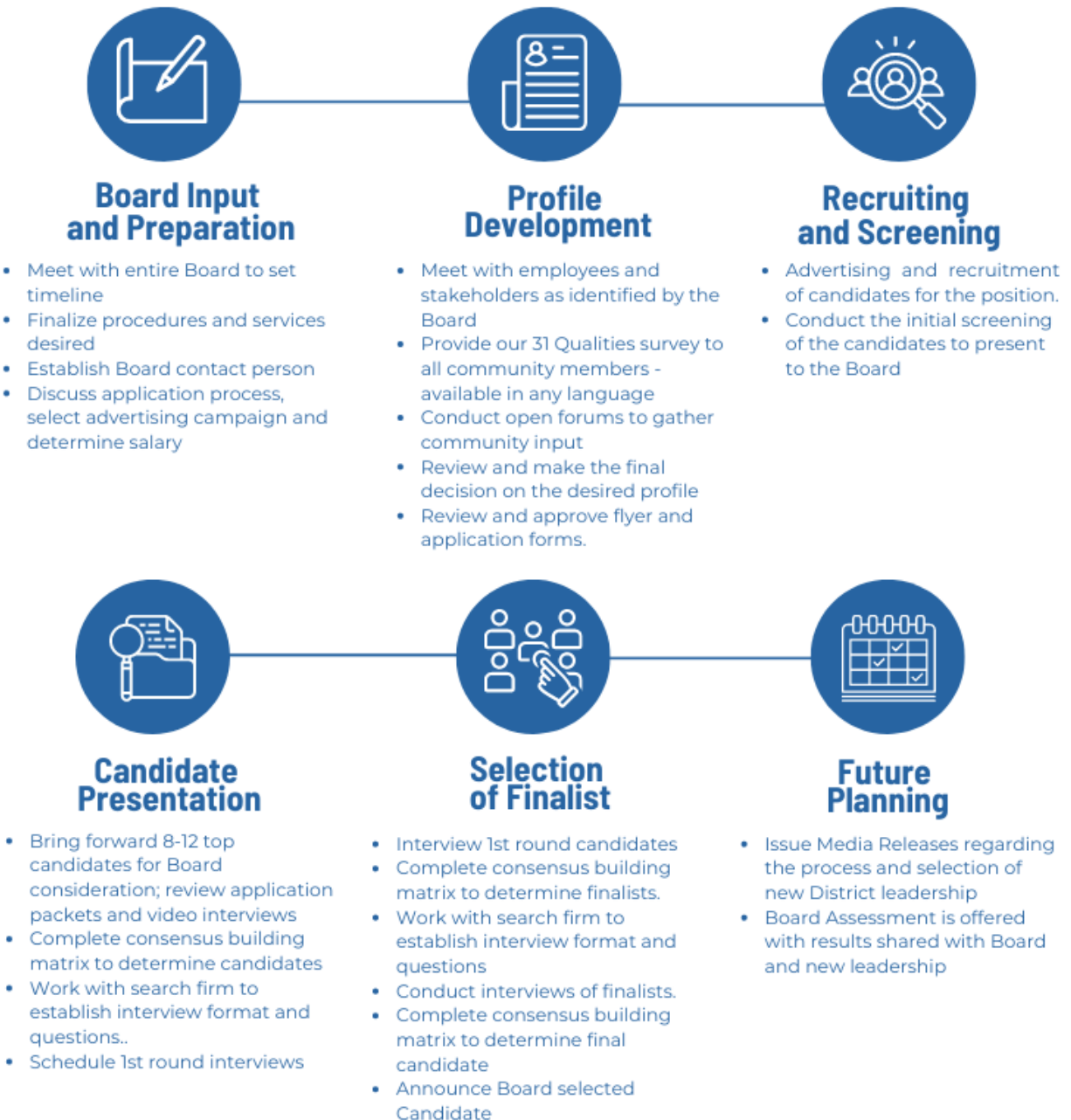
We take pride in our commitment to understanding the communities we serve, bringing not just length of experience but also lived, practical, and culturally relevant insights that enable us to guide your board toward

impactful and sustainable outcomes. Our holistic approach ensures that your board will have the tools it needs to lead with confidence, inclusivity, and a focus on long-term success.

Work Plan

## THE RAY WAY: OUR PROCESS

Ray & Associates' goal is to make the selection process professional, efficient, and successful to ensure your complete satisfaction with our services. Below you will find an overview of our process.



## SEARCH ACTIVITIES AND APPROACH

At Ray and Associates, we understand recruiting for the Oregon region requires a deep appreciation of the unique characteristics of the state’s educational landscape. Our recruitment process is tailored to align with the diverse needs of Oregon’s districts, ensuring candidates not only bring leadership qualities but also a deep understanding of the complexities of education in the state. We are proud to have a consultant on our team who currently sits on the Oregon State Board of Education and was previously board president of the North Clackamas School District. This insider perspective gives us direct access to state-specific knowledge, policy trends, and an understanding of how state decisions impact district-level operations.

What makes Oregon distinct is its commitment to equitable education, sustainability, and community involvement. From the Quality Education Model to the Student Success Act, Oregon is highly focused on funding strategies that address disparities and meet the needs of all students, including those from historically marginalized communities. Additionally, the state's approach to balancing local control with state standards means district leadership must be adaptive and forward-thinking.

We recognize Oregon's school finance system is complex, with reliance on local property taxes, state funding, and equalization formulas that vary between districts. Our recruitment strategies ensure candidates have a nuanced understanding of school finance in Oregon, particularly in relation to budget planning, funding adequacy, and the need for financial innovation to address both immediate and long-term needs.

With our comprehensive national network and Oregon-specific expertise, we recruit candidates who are not only proven leaders but who also demonstrate a commitment to understanding and navigating the unique financial, cultural, and educational challenges in Oregon. By doing so, we ensure a perfect fit between the needs of the district and the expertise of the candidates we present.

## WORKING WITH BOARD THROUGH THE SEARCH

At our first meeting with the Board, we will ask for a Board contact person and a district contact person. We can also discuss the frequency of desired contact regarding the search.

	<b>Ray and Associates, Inc.</b>	<b>Board</b>
<b>Stage One: Board Input and Preparation</b>	<ul style="list-style-type: none"> <li>• Meet with the Board members individually to obtain input for profile development.</li> <li>• Meet with entire Board to set timeline, finalize procedures and services desired, establish Board contact person, discuss application process, set advertising and determine salary.</li> </ul>	<ul style="list-style-type: none"> <li>• Provide individual input for profile development.</li> <li>• Set the timeline, finalize procedures and services desired, provide Board contact person, set advertising and salary.</li> </ul>
<b>Stage Two: Profile Development and Process</b>	<ul style="list-style-type: none"> <li>• Meet with employees and stakeholders as identified by the Board.</li> <li>• Hold morning and evening open forums to collect community input.</li> </ul>	<ul style="list-style-type: none"> <li>• Review and make the final decision on the desired profile.</li> <li>• Review and approve flyer and application forms.</li> </ul>
<b>Stage Three: Recruiting and Screening</b>	<ul style="list-style-type: none"> <li>• Advertising and recruitment of candidates for the position.</li> <li>• Screening of the candidates to bring forward the candidates that match the Board’s criteria.</li> </ul>	

<p><b>Stage Four: Candidate Presentation</b></p>	<ul style="list-style-type: none"> <li>• Bring forward 8-12 top candidates for Board consideration.</li> <li>• Provide a matrix to assess the top candidates.</li> <li>• Provide a summary of the individual Board responses.</li> <li>• Assist in establishing interview format and interview questions.</li> <li>• Schedule 1<sup>st</sup> round interviews.</li> </ul>	<ul style="list-style-type: none"> <li>• Review application packets.</li> <li>• View video interviews.</li> <li>• Complete consensus building matrix to determine candidates to interview in 1<sup>st</sup> round.</li> <li>• Work with search firm to establish interview format and questions.</li> </ul>
<p><b>Stage Five: Selection of Finalist and Future Planning</b></p>	<ul style="list-style-type: none"> <li>• Following 1<sup>st</sup> round interviews, lead Board through consensus building activity to reach determination of finalists.</li> <li>• Assist in establishing interview format and questions.</li> <li>• Schedule interviews of finalists</li> <li>• If the Board desires forums with the finalists, we moderate those forums.</li> <li>• Lead Board through a consensus building activity to determine final candidate.</li> </ul>	<ul style="list-style-type: none"> <li>• Interview 1<sup>st</sup> round candidates</li> <li>• Complete consensus building matrix to determine finalists.</li> <li>• Work with search firm to establish interview format and questions.</li> <li>• Conduct interviews of finalists.</li> <li>• Complete consensus building matrix to determine final candidate.</li> <li>• Announce Board Selected Candidate.</li> </ul>

## RECRUITMENT

Our professional objective is to aggressively recruit and advertise for the best candidate who meets the qualifications and characteristics of a Superintendent as set forth by the Board. Our recruitment process is very comprehensive, highlighted by the following steps:

- Largest recruiting network in the country.
- Inform the firm’s associates of the position and seek recommendations.
- **Advertise in local, regional, national and diverse venues known for high readership by school leaders which venues are approved by the Board such as: AASA, NABSE and ALAS. We post a 30-day ad in EdWeek at no cost to the district.**
- 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 Eugene School District 4J position.**
- Contact other organizations at state, regional and national levels regarding the position.
- Proactively seek out potential candidates at state and national conventions.

At Ray and Associates, we are deeply committed to ensuring that the recruitment process is equitable, accessible, and inclusive, particularly for candidates from communities that have been historically marginalized. We recognize that recruiting diverse leaders isn’t just about expanding the applicant pool but also about actively addressing systemic barriers and implicit biases that can limit opportunities for underrepresented candidates.

To ensure an equitable and accessible process, we take several deliberate steps:

- **Outreach to Diverse Communities:** We proactively engage with networks, professional organizations, and affinity groups that serve historically marginalized communities, ensuring our outreach goes beyond traditional channels. This helps us attract diverse talent, particularly candidates from BIPOC, LGBTQ+, and other underrepresented groups, ensuring they are well-represented in the applicant pool.
- **Removing Barriers to Entry:** We critically examine job descriptions and qualifications to ensure they are inclusive and do not create unnecessary barriers for capable candidates. For example, instead of emphasizing traditional metrics like years of experience, we focus on skills, lived experiences, and the potential for impact, creating more opportunities for candidates from diverse backgrounds.
- **Equity in the Screening Process:** We use structured, equitable evaluation criteria to assess candidates based on their competencies, experiences, and values rather than relying on subjective impressions. By using a standardized framework, we minimize the potential for unconscious bias to affect how candidates are reviewed.
- **Transparency and Accessibility:** We ensure the recruitment process is accessible by offering multiple ways for candidates to apply, providing accommodation when needed, and maintaining transparent communication throughout the process. Our goal is to create a recruitment experience where all candidates feel welcomed and supported.

By implementing these strategies, we aim to build an applicant pool that is not only diverse but also reflective of the communities our schools serve. We believe that addressing implicit bias and ensuring equitable access are critical to finding leaders who can drive positive, inclusive change within Oregon’s educational landscape.

## BACKGROUND CHECKS AND SCREENING

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. Our team will review the application information for these 8-12 candidates making sure they meet the desired qualities selected by the Board (i.e. teaching experience, etc.) Additionally, these candidates will be screened by our team which consists of the following:

- Checking the internet, social media, etc. to see what, if any, articles are found.
- Asking if they are still interested in the position.
- If nothing negative is found on the internet, the candidate is contacted and asked a series of questions including “Have you applied for any other position?”, “What is the status of your contract?”, “Have you ever been released, fired or resigned from a position?”. The candidates are also asked some district specific questions.
- We then contact references and non-references asking them a series of questions.

The 8-12 candidates are also asked to complete a one-way video through the Spark Hire program. If the candidates are deemed viable their application packet and video will be presented to the Board for review. Our team will discuss information found during the screening and assistance will be given to the Board to assist in making the decision about who to advance for 1<sup>st</sup> round interviews.

Upon the completion of candidate 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.

**In addition to our initial screening of the candidates, Ray and Associates will conduct criminal, civil litigation, sex offender, 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.**

## ENGAGING STAKEHOLDERS – STAKEHOLDER MEETINGS

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. We recommend virtual stakeholder sessions as well. We want to make sure everyone has an opportunity to participate whether in person or virtual. **These services are available in various languages at no additional fee.** 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, 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 for placement on the district website and for the district to distribute to district stakeholders.** 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 31 Desirable Characteristics Survey. This culminates 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.

## ENGAGING STAKEHOLDERS - INTERVIEW PROCESS

Should the board wish to have stakeholder participation during final round interviews, we would moderate sessions with stakeholders and obtain their feedback through our candidate impression survey. Links would be provided to the district for placement on their website and QR codes can be given to the participants which direct them to the survey.

Ray and Associates is committed to Diversity, Equity, Inclusion throughout the superintendent search process to address institutional bias. Over 40% of our search consultants are comprised of women and people of color. We involve the board, staff, students, and the community in the development of the "ideal candidate profile." Because we are aware of unconscious bias, we have adapted our search process to remove application barriers for candidates and we use an equitable screening process.

## MAJOR CHALLENGES TO A SUCCESSFUL SEARCH

The number of experienced Superintendents leaving the field of education is creating many openings. Because of this, Board members need to keep an open mind about candidates knowing they may not be able

to hire a person who already has experience as a Superintendent or perhaps not the length of experience they desire

Additionally, the Board will need to be open and honest in identifying the challenges of the district. They will also need to come to a consensus regarding the profile and identify characteristics in order for the firm to be able to recruit a candidate; someone who has the track record to continue to move the district forward and continue to identify and narrow the gaps in student achievement.

If everyone adheres to the search timeline, attends all scheduled meetings and maintains candidate confidentiality, the search process should go smoothly. If challenges arise, our team will help guide the Board in its decisions while still realizing all decisions are ultimately up to the Board.

## BOARD GOALS

While conducting one-on-one confidential interviews with board members we determine what is important to each member individually as well as what the board as a whole is looking for in candidates to help them achieve their goals. For some districts, lack of Superintendent communication is an issue. For others, they may want someone with a strong community visibility background, finance background and perhaps teaching experience. Perhaps we reach out to someone we know has accomplished these things in their current or former district. Another way to take into account board goals is through the screening and interview process. As an example, if communication is an issue, different scenarios could be given to candidates for them to provide writing samples in response to the scenarios. If a strong finance background is required, we look at candidate background information to see what experience they have in that area. There are various ways that board goals can be used in the recruiting and screening/interviewing processes.

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# EUGENE SCHOOL DISTRICT 4J SUPERINTENDENT SEARCH **SUGGESTED** PROCESS AND TIMELINE

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

DATE

DATE	
Stage 1 Board Input & Preparation	<u>10/28/2024</u> Consultant planning meeting with the Board and discussion regarding individual Board member interviews. <i>(Time: TBD) (option to conduct virtually)</i>
	<u>10/29/2024</u> Begin preparing information for the district promotional flyer or video and online application form with the district liaison representative(s).
	<u>10/29/2024</u> Notify all associates and other professional contacts of vacancy.
	<u>10/29/2024</u> Contact constituents and stakeholders for input meetings on <u>11/20-21/2024</u> .
Stage 2 Profile Development & Process	<u>10/30/2024</u> Online survey link, for input on developing the profile, available on District website from <u>10/30/2024</u> to <u>11/25/2024</u> .
	<u>11/20-21/2024</u> Meetings with constituent and stakeholder group representatives. <i>(In person, virtual or both?)</i>
	<u>11/25/2024</u> 8 a.m. deadline for survey/input from constituents, stakeholders and Board members, including online survey.
	<u>12/02/2024</u> Promotional flyer or video draft due.
<u>12/04/2024</u> Board to finalize Superintendent profile for the promotional flyer/video. <i>(Time: TBD) (option to conduct virtually)</i>	
Stage 3 Recruiting & Screening	<u>12/05/2024</u> E-mail promotional flyer/video and online application instructions to interested candidates.
	<u>1/12/2025</u> Deadline for all application materials. <i>(*See note below.)</i>
Stage 4 Candidate Presentation	<u>1/29/2025</u> 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) (In person)</i>
	<u>Wk 2/03/2025</u> Interview candidates (1 <sup>st</sup> round) <i>(option to conduct virtually)</i> .
	<u>Wk 2/03/2025</u> Meeting with consultant following the last interview. <i>(Time: TBD) (option to conduct virtually)</i>
Stage 5 Selection of Finalist & Future Planning	<u>Wk 2/10/2025</u> Interview finalist candidates (2 <sup>nd</sup> round). <b>(In person)</b>
	<u>Wk 2/10/2025</u> Final meeting with consultant following the last interview. <i>(Time: TBD) (option to conduct virtually)</i>
	<u>TBD</u> Board action to appointed selected candidate and approve employment contract.
	<u>TBD</u> Press release of new Superintendent.
<u>TBD</u> Board Self-Assessment Survey Results presented to the Board.	

**\*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.)**

## INFORMATION REQUIRED FROM BOARD/DISTRICT

During our first meeting with the Board, we will need to establish a Board contact person, typically the Board President, so we have a point of contact. The Board will also need to determine a district contact person to assist our office with scheduling of board and stakeholder meetings, meeting logistics, etc. If determined by the Board, our staff will prepare the search flyer and/or video. This is usually done with information provided by the district contact and/or communications department. We place the advertising (other than with state venues which we ask the district to place) and, after working the district to come up with the interview format and schedule, we contact the candidates to schedule their interviews.

### Budget

## SEARCH COST – THE COMPLETE PROCESS

**The cost of our Proposal is for a complete search and is not broken down by listing categories, hours, scope of work, etc.** 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 twenty-two thousand dollars (\$22,000.00) with a not to exceed price of twenty-eight thousand dollars (\$28,000.00).** If the Board selects only certain elements offered in this package, or requests services not included in this package, our fees and reimbursed expenses will be adjusted accordingly. The firm will discuss any modifications relating to the search fee regarding our services at the formal presentation. **The Superintendent search fee shall be paid in three (3) installments; 1/2 of total fee is due upon signing of the contract; 1/4 of fee is due at the time of the stakeholder meetings; and the final 1/4 of fee is due at the time of presentation of candidates.**

**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.

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

**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 and said expenses will be paid by as they occur.

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

expenses. Once the Board narrows the candidates down to two or three finalists, the finalists will interview in-person with the Board.

## PERFORMANCE CONTRACT

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

### Estimated COST SHEET – PREPARED FOR: EUGENE SCHOOL DISTRICT 4J

Ray and Associates, Inc. will spend as much time as needed to conduct a successful search for Eugene School District 4J. **Please Note: Our flat fee is inclusive of all services and is not broken down by scope of work, hours, etc.** The only hourly rates that would apply would be for requests above and beyond this Proposal and would be at the following rates:

**Consultant \$200.00/hr.; Administrative Asst. \$50.00/hr.**

#### Base Fee:

Ray and Associates, Inc. Base Fee ..... \$22,000.00

#### Travel:

Airfare (if needed).....1,000.00  
Ground Transportation (mileage billed at IRS rate per mile) .....1,000.00  
Hotel..... 800.00  
Meals ..... 300.00  
\*Travel Subtotal ..... \$3,100.00

**\*Expenses will be less if the district utilizes virtual meetings. Please see suggested timelines for meetings which can easily be conducted virtually.**

#### Board Approved Advertising:

Advertising expenses are stated separately as they are dependent upon each District and their unique needs. Our Associates make recommendations, and **the Board has the final authority on frequency and dollars spent.** Ray & Associates *does not collect a commission* for placing the ads. The average spent on advertising by a District is \$1,200 to \$1,500.

Advertising Expenses ..... \$1,500.00

**\*ESTIMATED SEARCH COST ..... \$26,600.00**

**\*Estimated cost does not include 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. Eugene School District 4J will be billed for only the actual expenses incurred.

## References

## REFERENCES

See Attachment B at end of Proposal.

## Litigation Record

## LITIGATION

We have not been involved in litigation with any clients.

## COMMITMENT TO DIVERSITY, EQUITY AND INCLUSION

Ray & Associates 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.

Ray & Associates is committed to identifying the best candidates that ensures each student will have the resources and support needed for their educational journey each and every day. We understand that students, staff, families and the community are the foundation and as our goal, we commit to finding the best candidates that will do the following:

- Provide quality instruction for each student.
- Include all students, families, staff, and community members.
- Transform systems that contribute to inequities.
- Develop relationships that are intentional and reciprocal.
- Collaborate with families, students, staff, and community.
- Communicate in an honest, open, and courageous manner.

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

## FUTURE PLANNING

**Ray & Associates**  
RECRUITING. DEVELOPING. ENGAGING.



# Empower leaders to deliver greater impact.

Choose solutions to support successful placements.

Finding the best candidate is critical, but it is only the first step. Leaders are most effective and inspired when they receive real-time support, meaningful tools, and actionable feedback in collaboration with a trusted partner.

Set your candidate up for success by investing in solutions designed for both experienced and new leaders alike. These customizable options from our partner CESO address the opportunities and challenges unique to K-12 executive roles to deliver true impact for the larger community.

Learn More Here! <https://theceso.com/services/>

### Strategic Planning

Drive true impact and increase community involvement, trust, and confidence in your district with guidance for strategic plan development and implementation based on your vision, goals, and values.

### Thought & Strategy Partnership

Leverage a coach to help focus on the important, not just the urgent. Tackle complex issues and achieve your goals as you alternate between thought and strategy work with a trusted partner.

### Operational Assessments

Gain a comprehensive understanding of your current operations and get a prioritized action plan for improvements. Available for transportation, communications, human resources, nutrition, technology, facilities, and finance.

### Strategic Communications

Build stakeholder support for the work you do for students and strengthen your community's awareness and understanding of your district through comprehensive, proactive communications strategies.

### District Office Studies

Increase organizational partnership and deliver better results with an in-depth study to better identify if your district office's roles and structures are aligned to support your strategic plan and overall operations.

### Executive Onboarding

Receive a fully customized onboarding experience to support daily tasks, board and community relations management, public speaking, team management, budgeting, time management, and more.



## FINAL REMARKS

**Satisfaction Guaranteed:** Ray and Associates, Inc. or Eugene School District 4J may terminate this contract at any time for any reason by giving at least fourteen (14) days' notice in writing. If the contract is terminated by Eugene School District 4J as provided herein, Ray and Associates, Inc. shall be paid a mutually

agreed upon payment as negotiated between Ray and Associates, Inc. and Eugene School District 4J for the work completed as of the date of notification of termination. Ray and Associates, Inc. shall incur no additional fees and expenses payable by Eugene School District 4J after notice of termination without written authorization from Eugene School District 4J.

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

In addition to this, we do not recruit candidates we have placed for a minimum of 5 years.

**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. Ray & Associates will preserve the confidential nature of any information which becomes available to us resulting from the services rendered to the Board.

At Ray & Associates, it's our job to take the pressure off your team. The details and process are our specialty, and you'll see this in every step of the search. Our priority is to guide your focus toward the big picture, allowing you to focus on learning more about the potential leader for your District, asking critical questions, and shaping the future for your students.

Should you have any questions about this Proposal, please do not hesitate to contact us at [kathy@rayassoc.com](mailto:kathy@rayassoc.com) or via phone at 319-393-3115.

**Thank you for your time as you make a decision to shape the future of your district.  
We are extremely pleased to be considered as your partner in the process to  
identify and engage your next visionary leader.**

## ATTACHMENT A: PROPOSER CERTIFICATIONS AND REPRESENTATIONS

FAILURE TO SIGN AND SUBMIT THIS FORM MAY BE CAUSE FOR PROPOSAL REJECTION

**EUGENE SCHOOL DISTRICT 4J**  
**INFORMAL REQUEST FOR PROPOSAL (IRFP)**  
**Solicitation # 25-193**  
**Superintendent Search Firm**

The undersigned hereby certifies that Proposer:

1. Has the authority to submit a proposal and to represent the organization in all phases of this IRFP process.
2. Has submitted information that is true and accurate to the best of their knowledge and understands that any false statement may disqualify this proposal from further consideration or be cause for contract termination.
3. Is one of the following, as defined in ORS 279A.120, of the State of Oregon.
  - Resident bidder: a bidder that has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the bid, has a business address in this state, and has stated in the bid whether the bidder is a "resident bidder". (ORS 279A.120 (b))
  - Non-resident bidder: a bidder who does not meet the definition above. (ORS 279A.120 (a))  
ORS 279A.120 (2) states for the purposes of awarding a public contract, a contracting agency shall: give preference to goods or services that have been manufactured or produced in this state if price, fitness, availability and quality are otherwise equal; and add a percent increase to the bid of a nonresident bidder equal to the percent, if any, of the preference given to the bidder in the state in which the bidder resides.
4. Has not discriminated and will not discriminate, in violation of subsection (1) of ORS 279A.110, against a disadvantaged business enterprise, a minority-owned business, a women-owned business, a business that a service-disabled veteran owns or an emerging small business in obtaining any required subcontracts.
5. Attests in writing that they have complied with the tax laws of this state and of any political subdivision of this state for no fewer than six years preceding the date of the solicitation closing. Applicable tax laws include, but are not limited to, ORS 305.620, ORS Chapters 316, 317, and 318, any tax provisions imposed by a political subdivision that apply to the Proposer or to the performance of the Contract, and any rules and regulations that implement or enforce those tax laws.
6. Certifies to the best of its knowledge and belief that neither it nor any of its principals:
  - 6.1. Are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from submitting bids or proposals by any federal, state or local entity, department or agency;

**ATTACHMENT A: PROPOSER CERTIFICATIONS AND REPRESENTATIONS**

- 6.2. Have within a five-year period preceding the date of this certification been convicted of fraud or any other criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contract, embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
  - 6.3. Are presently indicted for or otherwise criminally charged with commission of any of the offenses enumerated in paragraph 6.2. of this certification;
  - 6.4. Have, within a five-year period preceding the date of this certification had a judgment entered against proposer or its principals arising out of the performance of a public or private contract;
  - 6.5. Have pending in any state or federal court any litigation in which there is a claim against proposer or any of its principals arising out of the performance of a public or private contract; and
  - 6.6. Have within a five-year period preceding the date of this certification had one or more public contracts (federal, state, or local) terminated for any reason related to contract performance.
7. Acknowledges Receipt of Addenda No's. \_\_\_\_\_ through \_\_\_\_\_ inclusive.

**Where Proposer is unable to certify to any of the statements in this certification, Proposer shall attach an explanation to their offer. The inability to certify to all of the statements shall not necessarily preclude Proposer from award of a contract under this procurement.**

Kathy Schoenfelder  
Signature  
Coordinator of Leadership Acquisitions

Sept. 20, 2024  
Date

Kathy Schoenfelder  
Printed Name and Title

99-3698605  
Federal Tax Identification Number

Ray - Associates  
Company Name

901 17<sup>th</sup> Street NE  
Street Address

Cedar Rapids, IA 52402  
City, State, Zip

319-393-3115  
Phone

kathy@rayassoc.com  
Email

**ATTACHMENT B: PROPOSER REFERENCE SHEET**

**EUGENE SCHOOL DISTRICT 4J  
 INFORMAL REQUEST FOR PROPOSAL (IRFP)  
 Solicitation # 25-193  
 Superintendent Search Firm**

The District will attempt to contact references via phone, email, or both. If the District is unsuccessful in contacting any of your references or if it does not receive a response from any reference after three (3) attempts, your proposal may receive a lower score or be rejected. You are encouraged to notify your references that they may be contacted by the District.

The number of references required by this solicitation is **3**.

REFERENCE 1	
North Clackamas School District	
Name of Company	
Mitzi Bauer, Board Member	
Contact Name and Title	
971-269-9950	mitzi.bauer@clackamas.k12.or.us
Phone	Email
Due to COVID restarted 2020 - 2/2021 search	\$19,500
Contract Start & End Date	Contract Amount
Description of Services or Items Provided:	
Superintendent search.. Started up 2020. Restarted 2021.	

REFERENCE 2	
North Thurston Public Schools	
Name of Company	
Gretchen Maliska, Board President	
Contact Name and Title	
360-250-9915	gmaliska@nthurston.k12.wa.us
Phone	Email
1/2024 - 4/2024	\$23,000
Contract Start & End Date	Contract Amount
Description of Services or Items Provided:	
Superintendent search	

ATTACHMENT B: PROPOSER REFERENCE SHEET

REFERENCE 3

Educational Service District 123

Name of Company

Kara Kaelber, Board Member - former Chair

Contact Name and Title

509-430-1455

kkaelber@esd123.org

Phone

10/2021 - 2/2022

Email

\$25,000

Contract Start & End Date

Contract Amount

Description of Services or Items Provided:

Superintendent search for ESD serving over 75,000 students

## Superintendent

### Search Services Proposal for

# Eugene School District 4J Eugene, Oregon

September 2024



Phone: 888-375-4814  
Email: [mail@macnjake.com](mailto:mail@macnjake.com)  
Website: [www.macnjake.com](http://www.macnjake.com)



*Dr. Norman Lidder by rky*



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09/24

## Executive Summary

***“Your students, staff, and community deserve the best.”***

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 1,000 superintendents** and other officials in public and non-profit organizations across the United States. **McPherson & Jacobson is one of the leading national superintendent search firms.**

McPherson & Jacobson will work with the board to design a search that meets the unique needs of your school district. Our firm’s protocol allows the board to concentrate on the most important segments: the interview and selection of the successful candidate.

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.

At the core of our firm’s work is the belief that every student is entitled to high quality education and that this is dependent upon quality leadership. We understand that students have diverse needs, thus, we focus on the intentional recruitment of a diverse candidate pool that includes ethnic and cultural identity as well as experience in culturally proficient practices that have proven successful in addressing educational equity gaps.

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

- *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.*

## Experience

### Capacity

- McPherson & Jacobson has over 130 consultants located across the United States; this allows us to tailor each search to the timeline that best meets the needs of the board—while still giving the search our utmost attention.
- In the past 6 years, McPherson & Jacobson has conducted over 280 superintendent searches nationwide, 30 of these were for districts with an enrollment of over 15,000 students. In Oregon, McPherson & Jacobson has conducted 24 school administrator searches in the past 6 years, with 15 of these searches for superintendents. (Hillsboro School District 1J; Tigard-Tualatin School District; Springfield Public Schools; Greater Albany Public Schools; Oregon City School District; Grants Pass School District 7; Canby School District; North Wasco County School District 21; North Bend School District; Nyssa School District 26; Winston-Dillard School District

No. 116; Rainier School District #13; Willamina School District; Glide School District; and Glendale School District).

### 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.

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

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

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

### Key Staff

#### Dr. Steve Joel—Lead Consultant



Dr. Steve Joel has been with McPherson and Jacobson since 1996 and serves as a Regional Director.

A native of Long Island, NY, his entire career has been in education beginning as a teacher in a small rural Nebraska School District followed by 36 years as a school administrator; the last 34 serving as a superintendent.

In 2022, after serving 12 years, Dr. Joel retired as the superintendent in Lincoln, Nebraska which has more than 41,000 students. He has attained a number of state and national awards including the Nebraska Superintendent of the Year.

Dr. Joel is a member of AASA and has recently served as a mentor/teacher with the Urban Superintendent's Academy and serves on the Board of the Urban Superintendent's Association of America. Dr. Joel is also a frequent national presenter on topics such as the superintendent search, leadership development, board and administrative goal setting and operating principles.

Dr. Joel has degrees from Doane College, The University of Nebraska, and Kansas State University.

Dr. Joel has conducted over 60 superintendent searches and is McPherson & Jacobson's primary recruiter; for Clark County Schools District, Las Vegas, Nevada, he recruited over 30 applicants. Dr. Joel has also extensively recruited candidates and/or been the consultant for: Little Rock School District, Little Rock, AR; Orange County Public Schools, Orlando, FL; Jefferson County Public Schools, Louisville, KY; Fayette County Public Schools, Lexington, KY; Duval County Schools, Jacksonville, FL; Wake County Public School System, Cary, NC; Sunnyside Unified School District, Tucson, AZ; Charlotte-Mecklenburg Schools, Charlotte, NC; Dysart Unified School District, Surprise, AZ; Peoria Unified School District, Glendale, AZ; Mesa Public Schools, Mesa, AZ;

Scottsdale Unified School District, Scottsdale, AZ; Fox Chapel Area School District, Pittsburgh, PA, North Allegheny School District, Pittsburg, PA; Gardner Edgerton USD 231, KS; the Mississippi State Superintendent; the Nebraska Commissioner of Education; Baltimore County Public Schools, MD; Litchfield Public Schools, AZ; Sarasota Public Schools, FL; the Kentucky Commissioner of Education; Washoe County Schools, Reno, NV; and Caddo Parish School District, Shreveport, LA. Dr. Joel was the lead consultant for many of these searches.

### **Dr. Gustavo Balderas—Consultant**



Dr. Gustavo Balderas joined McPherson & Jacobson, L.L.C. in 2021.

Dr. Balderas began his life as the child of migrant farm workers in Eastern Oregon and developed his love of learning and passion for education in Oregon Public Schools, from kindergarten through his doctoral degree in educational leadership at the University of Oregon.

Dr. Balderas has been an educator for 35 years. He started his career in education as a high school teacher and counselor in the Hillsboro School District. He has served in leadership roles at all school levels and in both support and administrative roles at the district office level. He served as superintendent in California, Oregon and Washington prior to beginning his current tenure in the Beaverton School District in Beaverton, Oregon.

Dr. Balderas is a co-founder and past president of the Oregon Association of Latino Administrators. He currently serves as NW regional representative and President for the national Association of Latino Administrators Superintendents. Dr. Balderas was named the Oregon Distinguished Latinx Educator of the Year, the Oregon Superintendent of the Year, and the AASA National Superintendent of the Year.

Dr. Balderas has assisted in numerous superintendent searches including Hillsboro School District 1J and Nyssa School District, Oregon; Wenatchee School District, Kent School District, and Issaquah School District 411 in Washington.

### **Mrs. Heidi Sipe—Consultant**



Mrs. Heidi Sipe joined McPherson & Jacobson in 2024. She has served as the Superintendent of the Umatilla School District since 2007. Born and raised in Eastern Washington, she began her work in Eastern Oregon in 2000 and developed a deep passion for rural education, especially for students of poverty and emerging bilingual students. She believes that rural students have equal talent to urban peers but are often limited by reduced access to resources. To counter this, Mrs. Sipe

is committed to After-School and STEAM programming to help students gain access to new ideas and develop interests in their communities, and beyond.

Mrs. Sipe previously chaired the Teacher Standards and Practices Commission, served on the Oregon Taskforce on School Funding, was a founding councilor of the Oregon Educator Advancement Council, served two terms as Superintendent Advisor to the State Board of Education and serves on the Fair Dismissal Appeals Board. She is currently on the Executive Committee for AASA, the national School Superintendents Association and served on the AASA Governance Committee for two terms. She is a past-

president of the Oregon School Association of School Executives and is active in COSA, the Coalition of Oregon School Administrators.

Mrs. Sipe took a leave of absence from Umatilla to serve as the Assistant Superintendent for the Oregon Department of Education in fall of 2012 where she oversaw the Office of Educational Improvement and Innovation before returning to her district in spring of 2013. She was honored as Oregon's 2016 Superintendent of the Year. A hands-on leader who is fueled by students, she volunteers to coach the high school robotics team. The team, 4125 Confidential, is featured in the documentary, "Big Dreams in Umatilla," which aired nationwide on PBS stations in 2021. Heidi received her Bachelors of Arts in Reading from Eastern Washington University and her administrative credentials and Ed.S in Educational Leadership from Lewis and Clark College in Portland.

She has assisted with the Canby School District superintendent search.

### **Dr. Debra White—Consultant**



Dr. Debra White joined McPherson & Jacobson, L.L.C. in 2024.

Dr. White's lifelong commitment to education spans more than 30 years. Debra recently retired from the Georgia Department of Education where she held the position of District Effectiveness Specialist supporting districts and schools across the State of Georgia to improve instruction for all students.

Dr. White has demonstrated a proven track record of success as a leader through service as a Teacher, School Counselor, Assistant Principal, Language Arts Coordinator, Principal, Director of Leadership Development, Area Assistant Superintendent, and Assistant Superintendent for Curriculum/Instruction.

Debra received a Bachelor's Degree in Health and Physical Education from Morris Brown College, a Master's Degree in School Counseling and Specialist Degree in Educational Leadership from Georgia State University, and a Doctorate Degree in Educational Leadership from Argosy University.

Dr. White recently assisted with the Caddo Parish School District, Shreveport, Louisiana superintendent search.

**Additional Consultants** (they will assist with recruitment and other tasks as necessary)

### **Oregon Consultants**

**Mr. Don Grotting**, Retired Superintendent

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

**Mr. Michael Scott**, Retired Superintendent, Hillsboro

**Ms. Maureen Wolf**, Board Member, Northwest Regional ESU, Tigard

### **Washington Consultants**

**Dr. Ivan Duran**, Superintendent, Highline School District

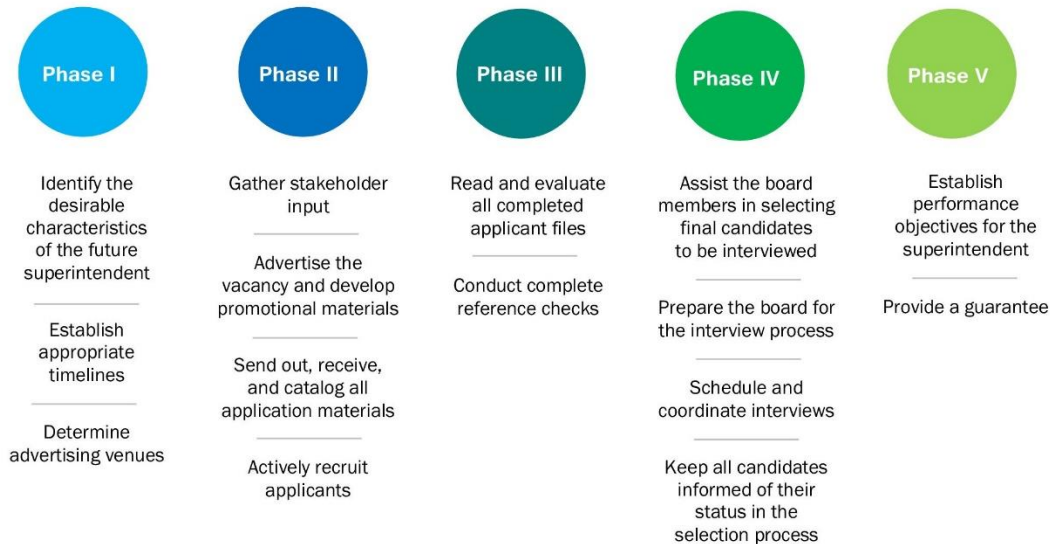
**Dr. Steven Lowder**, Retired Superintendent, Vancouver

## Why Choose McPherson & Jacobson

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

## Work Plan

### Five Phases of a Superintendent Search



#### Phase I—Initiating the Search Process

- Using a group process with the board, identify the most important characteristics of the future superintendent.
- Establish appropriate timelines and target dates for the selection process.
- Determine, with the board, appropriate advertising venues.
- Identify appropriate stakeholder groups.
- Assist the board in determining compensation parameters.
- Identify the point of contact for the district.

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

- Work with the district to schedule the stakeholder input meetings.
- Meet with groups identified by the board to provide stakeholder input into the selection process.
- Develop promotional literature and brochures announcing the vacancy (*optional—there is an additional fee for a full-color brochure*).
- Prepare and place announcement of vacancy.
- Develop an application unique to your vacancy that reflects the selection criteria determined by the board.
- Post application information and notify interested applicants.
- Actively recruit applicants who meet the district’s needs.
- Communicate with all Board Members in a timely manner.

### Phase III—Applicant Screening

- Evaluate each applicant against the selection criteria.
- Conduct reference checks.
- Pre-Interview and Video of Shortlist Applicants.
- Assist the board in developing a set of interview questions that reflect the identified selection criteria and characteristics.

### Phase IV—Reviewing Candidates with the Board, Interviews

- Review candidates with the board and assist board members in determining which candidates they will interview.
- Conduct background checks on candidates chosen to be interviewed.
- Assist the board in determining interview procedures.
- Coordinate interview and visitation procedures.
- Assist the groups identified by the board in planning for meeting each candidate and providing feedback to the board.
- Coordinate visitation procedures for the candidate's spouse/significant other.
- Assist the board in making final arrangements for each candidate's visit.
- Contact all finalists and schedule their interview dates.
- Notify all applicants not selected for an interview.
- Personally contact each finalist who was not offered the position.

### Phase V—Transition with Success

- Establish performance objectives for new superintendent.
- Provide a guarantee.

#### Recruiting for the Position for Oregon

We will advise the board to advertise on the OSBA (Oregon School Boards Association) website; on the COSA (Coalition of Oregon School Administrators) website; on the Washington State School Directors Association website; and on the Washington Association of School Administrators website. Our Oregon and Washington consultants will reach out to potential applicants in the area.

#### Understanding of What is Unique or Particular About Education and School Finance in Oregon

Education finance in Oregon is complex, political and inadequate. Due to a series of initiatives, financing the operation of schools shifted from the local to the state level. Now school districts are mostly funded by the state's General Fund, where schools compete with all other state government funded programs. Each budget cycle schools lobby to have sufficient funds allocated, but each cycle the State Legislature falls short. Contributing to the issue is that the state level budgeting agency uses methods which significantly shorts the increasing current service level costs facing schools. Recently,

Governor Kotek indicated support to change the methodology to calculate the current service level costs going forward.

The Oregon Quality Education Model (QEM) is a collaborative effort to define what is needed to properly educate the children of Oregon. Since the inception of the QEM, the legislature has failed to fund the model – now over \$1 billion short. The Legislature is required to report on the funding of the QEM, and each report is the same – inadequate funding. The QEM takes into account the vast demographic differences and program needs that are evident in each school district. Without the adequate funding, schools will struggle to maintain lower class sizes, provide sufficient Special Education services, provide for the social and psychological needs of students and provide the array of languages that are evident in our districts.

Some districts are able to pass a Local Option Levy to enhance the funding in their local districts and closer the gap left by inadequate funding. However, many do not, leaving a financial gap between districts.

Even though the state has provided some assistance to districts for facility improvements, the bulk of funding for new school buildings and modernization of existing buildings is at the local level. Some districts are able to pass bond issues necessary for this work while others are not. Thus, students in some districts attend school in antiquated and inadequate buildings. In some cases, schools border on being unsafe. Education finance in Oregon is complex, political and inadequate.

### **Methods to Communicate and Work with the Board**

The consultants will be in contact with the board president during the search as necessary to give updates on the progress. The consultants are available by phone or email to address any concerns or answer any questions the board has during the search process.

The McPherson & Jacobson consultants will meet with the entire board for three meetings:

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

In addition, the consultants will send regular emails to the board members keeping them abreast of the status of the search.

## Recruiting for the Position

While McPherson & Jacobson does not represent candidates, we keep a database 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 regional and national levels, candidates who match the board's identified criteria.

We do not maintain a stable of candidates, but our consultants do follow the careers of successful administrators. Individuals who are currently looking to take a new position are encouraged to register with us so they can receive notification of the vacancies we are representing. We have over 2,000 potential applicants currently registered with McPherson & Jacobson who will receive notification of the superintendent opening. Additionally, we will vigorously pursue current or emerging leaders through personal contact.

We use our consultant network to track the careers of successful administrators. We also work closely with universities, colleges, and professional organizations that represent and promote minority and female applicants. For the past five years, approximately **one-third** of our applicants have been female and **almost one-fourth** of our applicants have been ethnically diverse. In the past ten years, **one-third** of our placements have been women or ethnically diverse candidates.

## Engaging Stakeholders

Obtaining stakeholder input is an integral part of McPherson & Jacobson's search process. Since 1991, McPherson & Jacobson has conducted over 1,000 superintendent searches for school districts ranging from 10 to over 300,000 students. For each search, we have coordinated stakeholder input meetings and online input surveys.

McPherson & Jacobson will utilize K12 Insight to collect the online input and provide an analysis of the input received. The online input received, analysis, and input received from in-person meetings will be summarized into a report and presented to the board.

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

At the request of the district, online surveys for multiple languages can be developed and posted.

## Challenges

McPherson & Jacobson does not anticipate any difficulties executing the search. If any situations arise, we will address them as they occur. The only time we have difficulties with a search is when the district has chosen not to take our advice and not follow our established protocol.

## Aligning Candidates to the Board

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 regional and national levels, candidates who match the board's identified criteria. We do not maintain a stable of candidates, but our consultants do follow the careers of successful administrators.

### Possible Timeline (DRAFT)

- At the beginning of the search (**early November 2024**)
  - The qualities for the new superintendent are identified
  - A formal timeline is established
  - Advertising decisions are made and posted
  - Application information is posted
- Stakeholder input (**November 2024**)
  - Online stakeholder input is gathered
  - A summary of stakeholder input is presented to the board
- After the closing date (**mid-January 2025**)
  - 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 (**early February 2025**)
  - Consultants provide information to the board on all applicants who completed the process
  - Consultants present summary profiles and video interviews of qualified candidates to the board
  - The board selects the candidates it wants to interview
  - Criminal/financial/degree verification background checks are conducted on the candidates selected to be interviewed
  - McPherson & Jacobson notifies each applicant not selected for an interview
- Soon after the board selects their candidates (**mid to late February 2025**)
  - Semi-finalist interviews are conducted (if chosen by the board)
  - The board interviews its final candidates
  - The board selects their new superintendent
  - McPherson & Jacobson's consultants contact each candidate who was interviewed to notify them of their status

## **Assistance from the District**

### **Board Involvement:**

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

### **District Assistance:**

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

## Cost Proposal for Eugene School District 4J

### Investment for the Search

The fee for conducting the superintendent search is \$26,750 for Phases I-V.

**Estimated Expenses                      \$12,800**

- **Advertising**
  - Thirty (30) days on AASA (American Association of School Administrators)
  - Thirty (30) days on TopSchoolJobs (Ed Week online)
  - Thirty (30) days of advertising on NABSE (National Alliance of Black School Educators)
  - Six (6) weeks of advertising on ALAS (Association of Latino Administrators & Superintendents)
  - One posting on OSBA (Oregon School Boards Association)
  - One posting on COSA (Coalition of Oregon School Administrators)
  - One posting on the Washington State School Directors Association website
  - One posting on the Washington Association of School Administrators website
  - *Expenses may increase if additional advertising or alternative advertising venues are chosen.*
  
- **Stakeholder Meetings**
  - Maximum of two (2) days of in-person stakeholder meetings
  - Online stakeholder input surveys
  - Final report delivered to the board by email and one hard copy per board member, if requested
  - *If the district requests additional stakeholder input days, there will be an additional fee (negotiated between the district and the consultants) and additional expenses.*
  - *Depending on the languages selected for the surveys, there may be an additional fee charged for translating the results of the survey.*
  
- **Candidate Reviews/Information**
  - Video interviews of candidates (five (5) video interviews are included in the not to exceed amount)
  - Criminal/financial/degree verification background check for candidates chosen by the board for interviews (four (4) background checks are included in the not to exceed amount)
  - Assist in scheduling an on-site visitation to the finalist's home district (at the district's request).
  
- **Consultant Travel**
  - Travel expenses for consultants for scheduled trips to the school district (initial meeting with the board, stakeholder meetings, meeting to discuss the stakeholder input, meeting to present candidates to the board).
  - *Consultant travel expenses can be reduced if the district requests online meetings.*
  
- **Office Expenses**

**The total not to exceed amount including expenses is \$39,550.**

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

### Price Breakdown for Search Activities

Fees		Estimated Expenses	
Phase I	\$4,500	Advertising	\$ 2,500
Phase II	\$7,000	Office Expenses	\$ 900
Phase III	\$7,000	Videos/Background checks	\$ 650
Phase IV	\$5,500	Consultant Travel	\$12,800
Phase V	<u>\$2,750</u>	<b>Total</b>	<b>\$16,850</b>
<b>Total</b>	<b>\$26,750</b>		

### Payment Terms

- One-half (1/2) of the contracted fee due when the contract is signed;
- The final one-half (1/2) of the contracted fee due, plus all expenses shall be due and owing, upon the completion of the services

### Additional Information

#### Litigation

McPherson & Jacobson, L.L.C. has not been involved in any litigation in the past five (5) years.

#### Terminated/Cancelled Searches in the Past Five Years

During the 2022-2023 search year, the Fontana Unified School District, California, cancelled our contract without cause after we had started the search.

During the 2022-2023 search year, the Merced City School District, California, terminated our contract due to a disagreement regarding the release of the information received from the stakeholder meetings we conducted.

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

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

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

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

1. Consultants share the moral imperative and collective ownership to identify and eliminate disparities to ensure all candidates have an equal opportunity regardless of their race, ethnicity, socioeconomic status, cognitive/physical ability, language, marital status, gender, sexual orientation, gender identity, disability, or religion;

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

## Urban/Demographically Diverse School Districts McPherson & Jacobson has Served

### Over 100,000 students

- **Clark County School District**, Las Vegas, NV—Enrollment: 309,476 (2009/10)
- **Broward County Public Schools**, Fort Lauderdale FL—Enrollment 256,000 (2022/23)
- **Orange County Public Schools**, Orlando FL—Enrollment: 179,000 (2010/11)
- **Wake County Public School System**, Cary NC—Enrollment: 146,687 (2012/13)
- **Charlotte-Mecklenburg Schools**, Charlotte NC—Enrollment: 145,363 (2015/16)
- **Duval County Public Schools**, Jacksonville FL—Enrollment 125,188 (2011/12)
- **Baltimore County Public Schools**, Towson MD—Enrollment 111,000 (2022/23)

### 75,000 to 100,000 students

- **Jefferson County Public Schools**, Louisville, KY—Enrollment: 99,775 (2010/11)
- **Albuquerque Public Schools**, Albuquerque NM—Enrollment 70,000 (2023/24)

### 50,000 to 75,000 students

- **Washoe County School District**, Reno NV—Enrollment 65,538 (2023/24)
- **Mesa Public Schools**, Mesa AZ—Enrollment 64,000 (2019/20)
- **Elk Grove Unified School District**, Elk Grove CA—Enrollment: 62,000 (2014/15)
- **Howard County Public School System**, Ellicott City, MD—Enrollment 57,000 (2023/24)

### 25,000 to 50,000 students

- **San Bernardino City Unified School District**, San Bernardino CA —Enrollment 48,755 (2022/23)
- **Fayette County Public Schools**, Lexington KY—Enrollment: 37,000 (2010/11)
- **Peoria Unified School District No. 11**, Glendale AZ —Enrollment 36,000 (2023/24)
- **Poway Unified School District**, San Diego, CA—Enrollment 35,000 (2023/24)
- **Caddo Parish Public Schools**, Shreveport, LA—Enrollment 33,000 (2023/24)
- **Stockton Unified School District**, Stockton CA—Enrollment 33,000 (2022/23)
- **Norfolk Public Schools**, Norfolk VA—Enrollment 30,000 (2019/20)
- **Jackson Public Schools**, Jackson MS—Enrollment 27,062 (2017/18)
- **Richland School District Two**, Columbia SC—Enrollment 27,000 (2022/23)
- **Glendale Unified School District**, Glendale CA—Enrollment 26,200 (2015/16)
- **Academy District 20**, Colorado Springs CO—Enrollment 26,000 (2022/23)
- **Dysart Unified School District**, Surprise AZ—Enrollment 25,000 (2017/18)
- **Kent School District**, Kent WA—Enrollment 25,000 (2021/22)

### **Under 25,000 students**

- **Little Rock School District**, Little Rock AR—Enrollment 24,743 (2010/11)
- **Scottsdale Unified School District**, Scottsdale AZ—Enrollment 24,000 (2019/20)
- **Vancouver Public Schools**, Vancouver WA—Enrollment 23,400 (2020/21)
- **Colorado Springs School District 11**, Colorado Springs CO—Enrollment 23,000 (2021/22)
- **Washington County Public Schools**, Hagerstown MD —Enrollment 22,000 (2021/22)
- **Folsom Cordova Unified School District**, Ranco Cordova, CA—Enrollment 21,000 (2023/24)
- **South Bend Community School Corporation**, South Bend IN—Enrollment 20,771 (2010/11)
- **Hillsboro School District 1J**, Hillsboro OR—Enrollment 20,000 (2022/23)
- **New Haven Public Schools**, New Haven CT—Enrollment 20,000 (2022/23)
- **Issaquah School District 411**, Issaquah WA—Enrollment 19,000 (2021/22)
- **Allentown School District**, Allentown PA—Enrollment 18,000 (2009/10)
- **Alexandria City Public Schools**, Alexandria VA—Enrollment 16,000 (2022/23)
- **Reynolds School District**, Fairview OR—Enrollment: 14,000 (2011/12)
- **Roanoke City Public Schools**, Roanoke VA—Enrollment 14,000 (2019/20)
- **Tigard-Tualatin School District**, Tigard, OR—Enrollment 12,000 (2023/24)

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

July 15, 2024

To Whom It May Concern,

I am writing to extend my highest recommendation for McPherson and Jacobson following their exceptional work in recruiting a new superintendent for the Tigard-Tualatin School District in Tigard, Oregon during the 2023-2024 school year. Our district, the ninth largest in the state, serves roughly 11,500 students. We were in search of a leader who not only had a deep understanding of education but also possessed the strategic vision and leadership skills necessary to guide our schools through a period of transformation. McPherson and Jacobson exceeded our expectations in every regard.

From the outset, McPherson and Jacobson demonstrated a comprehensive understanding of our district's unique needs and challenges. When the sitting superintendent decided to retire a few months before the end of the school year, the board assumed that we would need to hire an interim leader given the short timeframe. The McPherson and Jacobson team immediately encouraged us, based on their deep knowledge of our district, to conduct a search for a permanent hire. They took the time to assess our situation thoroughly, engage with key constituents, and develop a clear profile of the ideal candidate. Their methodical approach ensured that only the most qualified individuals were considered, and they presented us with a pool of highly capable candidates, each of whom was well-suited for the role.

I worked closely with the McPherson and Jacobson team throughout the recruitment process and was continually impressed by their exceptional level of professionalism, communication, and dedication to our vision and mission. Our board is deeply committed to community engagement and while our timeframe was short, they were able to provide multiple opportunities for community members to have their voices heard which gave us valuable feedback that we used in making our decision. Their team was always available to answer questions, provide updates, and offer valuable insights. Their dedication to transparency and collaboration made the entire process seamless and efficient.

Ultimately, McPherson and Jacobson helped us find a superintendent who not only meets but exceeds our expectations. The candidate they identified has already begun making a significant positive impact on our district, bringing fresh ideas and a renewed sense of purpose to our schools. This success is a direct result of the thorough and thoughtful approach taken by McPherson and Jacobson.

I would highly recommend McPherson and Jacobson to any organization seeking to fill a critical leadership position. Their expertise, commitment, and results-oriented approach make them an invaluable partner in the recruitment process. We are grateful for their assistance and look forward to future collaborations. Please do not hesitate to contact me if you have any additional questions.

Sincerely,



Tristan Irvin

Board Chair, Tigard-Tualatin School District

boardmember.irvin@ttsd.k12.or.us

541.915.5266

January 16, 2024

To Whom It May Concern:

I am writing to provide my recommendation for McPherson and Jacobson, who completed the Superintendent Search for the Hillsboro School District in Hillsboro, Oregon. The district serves about 19,000 students and is the fourth largest district in the state. The consultants' knowledge, professionalism, and willingness to listen to our school board created an atmosphere that helped our community choose an exceptional new superintendent.

As the chair of the Hillsboro School District Board of Directors, I worked closely with the McPherson & Jacobson consultants facilitating the search process. Our long-time superintendent was outstanding and, upon his retirement, the board wanted to ensure the momentum that our existing team had built would continue. Completing an executive search process was new for this board and we wanted to hire an experienced team that understood the importance of this critical decision for our community.

The McPherson & Jacobson team took great pains to inform and guide us through the most important job a school board will ever have. The Mac&Jake team worked with the board, asking thought-provoking questions, and helped us to form a unified view of what we as a board were looking for in a superintendent. This was accomplished without inserting themselves into the decision itself. They heard what we wanted and assisted us in achieving our goals.

Our board prioritized stakeholder input. The team at McPherson & Jacobson provided multiple avenues to ensure multiple voices were heard. Various groups participated through customized focus groups, online surveys as well as listening sessions available to those who speak English as a second language. The data was collected, and a detailed report provided to the board, so we fully understood the general themes as well as unique feedback provided by our community.

In the end, the board was presented with a slate of highly qualified candidates all of which would have been excellent leaders for our district. The consulting team understood the qualities and characteristics we expected from our next superintendent and delivered the candidates that made this a competitive process.

Once again, I highly recommend working with the team from McPherson and Jacobson. Please do not hesitate to contact me if you have any additional questions.

Sincerely,



Mark Watson  
Chair, Hillsboro School District Board of Directors  
[watsonm@hsd.k12.or.us](mailto:watsonm@hsd.k12.or.us)/503.939.5335

## ATTACHMENT A

### ATTACHMENT A: PROPOSER CERTIFICATIONS AND REPRESENTATIONS

FAILURE TO SIGN AND SUBMIT THIS FORM MAY BE CAUSE FOR PROPOSAL REJECTION

**EUGENE SCHOOL DISTRICT 4J  
INFORMAL REQUEST FOR PROPOSAL (IRFP)  
Solicitation # 25-193  
Superintendent Search Firm**

The undersigned hereby certifies that Proposer:

1. Has the authority to submit a proposal and to represent the organization in all phases of this IRFP process.
2. Has submitted information that is true and accurate to the best of their knowledge and understands that any false statement may disqualify this proposal from further consideration or be cause for contract termination.
3. Is one of the following, as defined in ORS 279A.120, of the State of Oregon.
  - Resident bidder: a bidder that has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the bid, has a business address in this state, and has stated in the bid whether the bidder is a "resident bidder". (ORS 279A.120 (b))
  - Non-resident bidder: a bidder who does not meet the definition above. (ORS 279A.120 (a))  
  
ORS 279A.120 (2) states for the purposes of awarding a public contract, a contracting agency shall: give preference to goods or services that have been manufactured or produced in this state if price, fitness, availability and quality are otherwise equal; and add a percent increase to the bid of a nonresident bidder equal to the percent, if any, of the preference given to the bidder in the state in which the bidder resides.
4. Has not discriminated and will not discriminate, in violation of subsection (1) of ORS 279A.110, against a disadvantaged business enterprise, a minority-owned business, a women-owned business, a business that a service-disabled veteran owns or an emerging small business in obtaining any required subcontracts.
5. Attests in writing that they have complied with the tax laws of this state and of any political subdivision of this state for no fewer than six years preceding the date of the solicitation closing. Applicable tax laws include, but are not limited to, ORS 305.620, ORS Chapters 316, 317, and 318, any tax provisions imposed by a political subdivision that apply to the Proposer or to the performance of the Contract, and any rules and regulations that implement or enforce those tax laws.
6. Certifies to the best of its knowledge and belief that neither it nor any of its principals:
  - 6.1. Are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from submitting bids or proposals by any federal, state or local entity, department or agency;

*IRFP: Superintendent Search Firm*

*Page 11 of 14*



## ATTACHMENT B: PROPOSER REFERENCE SHEET

**EUGENE SCHOOL DISTRICT 4J**  
**INFORMAL REQUEST FOR PROPOSAL (IRFP)**  
**Solicitation # 25-193**  
**Superintendent Search Firm**

*The District will attempt to contact references via phone, email, or both. If the District is unsuccessful in contacting any of your references or if it does not receive a response from any reference after three (3) attempts, your proposal may receive a lower score or be rejected. You are encouraged to notify your references that they may be contacted by the District.*

The number of references required by this solicitation is **3**.

### **Hillsboro School District 1J**

3083 NE 49th Place  
Hillsboro OR 97124  
School Phone: 503-855-1500  
School District Contact: Rose Roman 503-844-1789  
Board Contact: Mark Watson 503-939-5335  
Search Year: 2022/23  
Enrollment: 20,000

### **Tigard-Tualatin School District**

6960 SW Sandburg  
Tigard OR 97223  
School Phone: 503-431-4000  
School District Contact: Patty Roberts 503-431-4002  
Board Contact: Tristan Irvin 541-915-5266  
Search Year: 2023/24  
Enrollment: 12,000

### **Washoe County School District**

425 East Ninth Street  
PO Box 30425  
Reno NV 80512  
School Phone: 775-348-0200  
Board Contact: Beth Smith 775-997-8299  
Search Year: 2023/24  
Enrollment: 65,538

### **Kent School District**

12033 SE 256 St.  
Kent WA 98030  
School Phone: 253-373-7000  
Board Contact: Ms. Leslie Hamada 253-263-0090  
Search Year: 2021/22  
Enrollment: 25,000

**Issaquah School District 411**

5150 220th Ave SE

Issaquah WA 98029

School Phone: 425-837-7000

School District Contact: Diane Ghanbari

Board Contact: Anne Moore 425-837-7002

Search Year: 2021/22

Enrollment: 19,000



## **ITEM FOR ACTION**

### **Date of Meeting**

October 16, 2024

### **Title**

Select Superintendent Search Firm and Runner-Up to Move Forward with Negotiations and Contracting

### **Presenter**

Judy Newman, Board Director and Ad Hoc Superintendent Search Board Committee Chair

### **Background**

After interviewing of the superintendent search firm finalists and the reference checks of those finalists having been completed, the board of directors will select a search firm and runner-up to move forward with negotiations and contracting.