

In accordance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please call the Superintendent's Office (626) 471-2010, twenty-four hours prior to the meeting so that reasonable arrangements can be made. The Administration Center Board Room is wheelchair accessible.



In accordance with a recent amendment to the Ralph M. Brown Act, public records related to the public session agenda, that are distributed to the Governing Board less than 72 hours before a regular meeting, may be inspected by the public at the District Administration Office located at 325 E. Huntington Drive, Monrovia, Ca 91016, during regular business hours (8:00am to 4:00pm.)



**MONROVIA UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION
325 E. Huntington Drive Monrovia, California 91016**

**SPECIAL BOARD OF EDUCATION OPEN SESSION MEETING
Thursday, January 18, 2024
1:00 p.m. - Board Room**

A. CONVENE SPECIAL BOARD OF EDUCATION OPEN SESSION MEETING (GC54959)

1. Meeting called to order by presiding chairperson, _____ at _____ pm.
2. Pledge of Allegiance
3. Roll Call:
Jennifer Anderson, Board President _____ Flint Fertig, Interim Superintendent _____
Rob Hammond, Board Vice-Pres. _____
Maritza Travanti, Board Clerk _____
Selene Lockerbie, Board Member _____
Traci Gholar, Board Member _____
4. Public Comments for items on the Special Board of Education Open Session Agenda

B. EXECUTIVE SEARCH FIRM INTERVIEWS - SUPERINTENDENT SEARCH PROCESS

1. The Board of Education will interview executive search firms to potentially lead the search to fill MUSD's Superintendent vacancy.
 - Education Support Services Group
 - Leadership Associates
 - McPherson and Jacobson, LLC
 - The Cosca Group

[Proposal Education Support Services.pdf](#)
[Proposal Leadership Associates.pdf](#)
[Proposal McPherson & Jacobson LLC.pdf](#)
[Proposal The Cosca Group.pdf](#)

C. ADJOURN SPECIAL BOARD OF EDUCATION MEETING

BOARD OF EDUCATION Agenda Item Report

Meeting Date: January 18, 2024

Submitted by: Liana Beserra

Submitting Department: Office of Superintendent

Item Type: Information

Agenda Section:

Subject:

1. The Board of Education will interview executive search firms to potentially lead the search to fill MUSD's Superintendent vacancy.

Suggested Action:

- Education Support Services Group
- Leadership Associates
- McPherson and Jacobson, LLC
- The Cosca Group

Attachments:

[Proposal Education Support Services.pdf](#)

[Proposal Leadership Associates.pdf](#)

[Proposal McPherson & Jacobson LLC.pdf](#)

[Proposal The Cosca Group.pdf](#)

Superintendent Search Proposal

January 10, 2024



Prepared by:

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Dr. Alan Rasmussen, ESS Executive Director
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Education Support Services Group

Jennifer Anderson, Board President
Monrovia Unified School District
325 East Huntington Drive
Monrovia, CA 91016

Dear President Anderson and Members of the Board of Education:

Thank you for your consideration of Education Support Services (ESS) to assist the Monrovia Unified School District Governing Board in its search for your next Superintendent. It would be an honor to work with the Board and your education partners in this important endeavor.

The ESS Consulting Group was established in 2006 as an independent LLC that later became affiliated with the law firm Atkinson, Andelson, Loya, Ruud & Romo. Our strategic partnership with AALRR was created in response to requests by school districts for support in areas calling for non-legal solutions. Based on client demand, ESS expanded its services in 2017 to include executive searches.

The following pages contain an overview of the services, timelines, and costs within the four phases of an ESS search. What makes our firm unique is that any aspect of the described activities can be modified to align with Board priorities and preferences. ESS's commitment to be flexible leads to a concierge-level experience that is customized for each client.

ESS has facilitated high-profile searches in districts of varying size and need throughout California. A list of search clients and candidate retention rates can be found on page 11 of our proposal. Contact information and letters of endorsement from previous clients are also included to offer an in-depth perspective of ESS's track record of success.

If invited to conduct the search for the Monrovia Unified School District, our well-connected advisers, Mr. Richard Tauer, Dr. Mike Matthews and Dr. Alan Rasmussen, will facilitate the process. Together, these stand-out leaders have served in every capacity from classroom teacher to principal to director to assistant superintendent to superintendent in small, medium, and large districts throughout California. Their biographies can be found in section seven of our proposal, offering further insight into the unique skillset and experiences of our consultants.

In closing, I would like to emphasize that ESS is purposeful in its decision to undertake a smaller number of searches each year. This allows our advisers to devote significant time and attention to each client. Moreover, it offers an added safeguard that the same pool of candidates is not being presented to school boards across the region. As a result, we are proud to share that ESS maintains significantly higher candidate retention rates than our competitors.

If you have any questions about the Education Support Services (ESS) Group, or our proposal, please feel free to contact me directly at 949-283-7862 or slovely@aalrr.com.

Sincerely,

Suzette Lovely

Suzette Lovely, Ed.D.
Managing Director, ESS

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Section 1: Company Profile

Our Vision: *To be California's first resource for K-14 governance, executive development, and strategic support.*

The Education Support Services (ESS) Group is a leadership and management consulting firm organized as a limited liability company. Our consultants are professional practitioners, recognized as experts in the field of education. ESS consultants serve as trusted advisers to school boards, superintendents, central office leaders, and site administrators to enhance systems, procedures, and human resource needs.

ESS, which was established in response to requests by school and community college districts for support in areas that call for non-legal solutions, maintains a strategic affiliation with the law firm, Atkinson, Andelson, Loya, Ruud & Romo (AALRR). This affiliation is supported by the firm's managing partners to achieve mutual benefit including referral and operational support from AALRR to ESS, access to educational practitioners that enhance the value of AALRR's legal solutions, and expanded client services.

ESS maintains a cadre of consultants who work as independent contractors. Our consultants have the option to accept outside assignments, as long as such assignments are not in direct conflict with services being provided to ESS clientele.

The ESS Difference

- We are a small firm known for our concierge-level attention and services.
- We maintain a limited number of search clients at any given time to ensure greater accessibility and responsiveness to trustees and applicants.
- We collaborate directly with the Governing Board to solidify a search timeline that aligns with local circumstances and needs (e.g., Board meeting schedules, trustee availability, District calendar, community expectations, etc.).
- We boast a track record of assembling applicant pools with diverse backgrounds and experiences that represent the face of California.
- We have ongoing access to legal advice from AALRR Education Law Practice Group attorneys.
- We tap into existing District resources/staff and collaborate closely with your search liaison to expedite the process and reduce costs.
- We engage with an extensive network of talented leaders who are 'superintendent ready'; however, we do not maintain a stable of candidates.
- We provide Board member access to all applications and supporting materials.
- We connect our fees to desired levels of search adviser involvement, with the Board's ability to modify tasks to reduce costs.

Section 2: Proposed Timeline and Search Services

An ESS search involves four phases represented by the acronym **EAST: Engagement, Activation, Selection, Transition**. The timelines and services described herein can be modified to meet Board priorities, District needs, scheduling opportunities, and unforeseen circumstances.

Engagement Phase: January 29 – March 15, 2024	
<p>Board Workshop</p> <p>Search Protocols</p> <p>(Special Open/Closed Session Board Meeting)</p> <p>Week of January 29 or February 5, 2024</p>	<p>This two-hour workshop assists the Governing Board in becoming ‘search ready’. The workshop includes: review of search timelines and process; confidentiality commitments; compensation considerations and salary parameters; screening factors; and experience requirements. The Board identifies District needs, leadership priorities, education partners for input sessions, and any prospective candidates it would like ESS to contact.</p>
<p>Education Partner Outreach</p> <p>Completed by March 1, 2024 or earlier</p>	<p>Search advisers meet with Board-determined education partners to identify District strengths, needs, and ideal qualities of MUSD’s next Superintendent. A community forum is also scheduled so that any employee or member of the public can offer in-person input. Results of the online survey are tallied, disaggregated and displayed in the <i>Leadership Profile</i>.</p>
<p>Presentation of Leadership Profile Report</p> <p>March 13, 2024</p> <p>(Regular Board Meeting)</p>	<p>Advisers present a <i>Leadership Profile Report</i> to the Board summarizing input from Monrovia’s education partners. The Board affirms criteria in the profile and adds any additional screening factors. Candidates are recruited, screened, and selected based on District needs and ideal leadership qualities identified by the Board and broader community.</p>
Activation Phase*: February 9 – March 15, 2024	
*Overlaps with Engagement Phase	
<p>Job Posting</p> <p>Opens: February 9, 2024</p> <p>Closes: March 15, 2024</p>	<p>The Superintendent vacancy is posted in a variety of sources and platforms, including EDJOIN, EdCal, and other Board-determined publications.</p>
<p>Recruitment</p> <p>Ongoing</p>	<p>ESS advisers utilize an array of local, state, and national networks to actively recruit, engage, and screen candidates who match the <i>Leadership Profile</i> characteristics.</p>
<p>Reference Checks</p> <p>Ongoing</p>	<p>ESS advisers contact candidate references and conduct “blind” appraisals of each applicant, including review of social media accounts and digital footprint. Candidates are evaluated and ranked against the <i>Leadership Profile</i> criteria.</p>

Selection Phase: March 25-May 24, 2024	
<p>Review of Applications</p> <p>Week of March 25, 2024</p>	<p>Trustees review confidential application materials prior to closed session, in which the candidate slate for interviews will be discussed and finalized.</p>
<p>Determination of Candidate Slate</p> <p>Week of April 8, 2024 (Special Closed Session Board Meeting)</p>	<p>Board meets with ESS advisers to identify the best qualified candidates to invite for interviews. Candidates not selected to interview are notified. Board reviews/finalizes first-round interview questions. Trustees agree on employment contract parameters.</p>
<p>First-Level Interviews</p> <p>Saturday, April 20, 2024 (Special Closed Session Board Meeting)</p>	<p>First-level interviews conducted by the Governing Board. At the conclusion of the daylong interviews, the search advisers guide the Board in narrowing the pool and determining which individuals to invite back for a second interview. Second-level interview questions are drafted.</p>
<p>Second-Level Interviews</p> <p>Sunday, April 21, 2024 (Special Closed Session Board Meeting)</p>	<p>Second-level interviews conducted by the Governing Board, assisted by search advisers. Board selects its preferred candidate. ESS notifies candidates who are not moving forward in the process.</p>
<p>Employment Contract Negotiations</p>	<p>Board identifies agency negotiators to draft an employment agreement for the Board's consideration. Typically, the Board President and legal counsel are assigned to this role.</p>
<p>Validation Visit</p> <p>Week of April 29, 2024</p>	<p>Board subcommittee may decide to visit the workplace of the preferred candidate. ESS will assist Trustees and the finalist in scheduling this visitation. If a Board majority participates in the visit, it constitutes a meeting that must be properly noticed and agendized.</p>
<p>Background Checks</p>	<p>Search advisers engage with a third party to conduct a thorough review of the finalist, including criminal, civil, credit, education, employment, and social media history.</p>
<p>Announcement of Board's Preferred Candidate TBD</p>	<p>Following a favorable background check, ESS advisers collaborate with the Board president and finalist to develop a press release and announcement schedule contingent upon the finalist's pending selection and Board approval.</p>
<p>Approve Employment of New Superintendent</p> <p>May 8 or 22, 2024 (Regular Board Meeting)</p>	<p>Governing Board takes formal action to hire the new Superintendent (closed session) and approve the employment contract (open session), with start date of July 1, 2024.</p>

Transition Phase: July-August 2024	
Setting the Foundation for a Successful Transition	ESS advisers provide a facilitated transition meeting with the new Superintendent and Board to review information gleaned during the search process and assist the governance team in identifying 'next steps' to move forward.
Optional Support Services	Depending on District needs and the experience of the new Superintendent, ESS advisers are available to provide governance training, superintendent goal setting, evaluation development, and/or executive coaching.

Section 3: Education Partner Outreach

Focus Groups and Community Forum

ESS advisers will schedule focus group meetings with education partners as well as an open community forum based on participant availability and District preferences.

Once focus group participants are identified by the Board at its initial planning workshop, the following email will be sent:

The Monrovia Unified School District Board of Education has retained Mr. Richard Tauer Dr. Mike Matthews, and Dr. Alan Rasmussen from Education Support Services (ESS) to facilitate the search for MUSD's next Superintendent. Your voice is vitally important as candidates are recruited and vetted for this process.

*With this in mind, the search advisers would like to meet with you on **(date/time)** to seek your input surrounding three key questions:*

- What are the District's strengths? What might draw candidates to want to work in the Monrovia Unified School District?*
- What are some key challenges/needs the District is facing?*
- What qualities/characteristics are important for MUSD's next Superintendent to be successful in the role?*

Please respond to this email to confirm your participation. If, however, you are unable to attend this meeting, but wish to communicate with the search advisers directly, please respond via email and include your phone number so they may contact you.

Online Survey

In addition to meetings with specific education partners, ESS enlists input from all employees, parents, students, and the broader Monrovia community through an online survey. A sample survey is provided on pages 8-10 of this proposal, with the caveat that the Board can modify or eliminate survey questions as deemed appropriate. Online survey data will be incorporated into the *Leadership Profile Report*.

How Will Stakeholder Input Be Used?

Input from educational partner meetings and the online survey are synthesized into a *Leadership Profile* organized around universal themes. Input gathered during the engagement phase of the search will assist the Monrovia Board of Education to:

- Better understand District needs and challenges from a variety of perspectives and points of view.
- Align/integrate Board priorities with the ideal leadership qualities described by education partners and the greater community.
- Gain valuable insight to inform the Board's selection of its next Superintendent.
- Provide a roadmap of essential actions for the newly hired Superintendent.
- Hold up a mirror to the MUSD culture as a tool to organize for the future.

Superintendent Search Online Survey



Introduction: The Monrovia Unified School District Board of Education is seeking input from education partners in the District's search for the next Superintendent. This survey is designed to gather your perceptions about the current state of the District along with the experiences and ideal leadership qualities you feel are most important for the incoming Superintendent to possess.

The survey is being conducted by outside search advisers who are assisting the Board in this important endeavor. All individual responses will remain anonymous.

Section I: Educational Partner Role

Please indicate your current role in the District (drop-down menu).

1. Administrator
2. Certificated staff
3. Classified staff
4. Parent
5. Student
6. Community member
7. Other

Section II: State of the District

Please rate the overall quality of teaching and learning in the Monrovia Unified School District.

Excellent	Above Average	Average	Below Average	Poor

Education Support Services Group

In the next series of questions, please select the response that best describes your agreement with each statement.

	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
1. The District provides a compelling vision for the future.					
2. The District maintains high expectations for student performance.					
3. The District is working to close achievement gaps.					
4. The District provides adequate resources to support student learning.					
5. Schools in the District are safe.					
6. District facilities are clean and well maintained.					
7. The District welcomes/ encourages community engagement.					
8. Communication from the District is clear and timely.					
9. The District creates the conditions to recognize and celebrate diversity.					
10. The District is heading in the right direction.					

Section III: Expertise and Experience

Below are key areas of expertise that candidates for the Monrovia Unified School District Superintendent position may possess. From your perspective, how much weight should the Board place on each area based on the scale of importance?

	Critically Important	Mildly Important	Unimportant
Teaching and Learning			
Experience as a Site Principal			
Understanding School and Community Culture			
Negotiations/Labor Relations			
Facilities Management			
Fiscal Management			
Community Relations			
Board Governance			

Section IV: Leadership Qualities

This next section asks you to consider the leadership qualities of an effective Superintendent. While all these qualities are important, please select the five you feel are **MOST IMPORTANT**.

- ☐ Present/visible throughout the District and community
- ☐ Sensitive to/understands the needs of diverse learners
- ☐ Forward thinker and open to new ideas
- ☐ Knowledgeable about current practices surrounding teaching and learning
- ☐ Builds internal capacity and teamwork
- ☐ Works effectively with the Board of Education
- ☐ Develops a clear, compelling vision for the future
- ☐ Ensures the District remains fiscally solvent
- ☐ Sets and models a culture of high expectations for students and employees
- ☐ Fosters a climate of trust and mutual respect
- ☐ Recognizes and celebrates staff contributions
- ☐ Can effectively navigate political and/or controversial issues

Section V: Personal Attributes

From your perspective, which personal attributes should be given the most attention by the Board when assessing applicants? While each attribute may be important, select the five that are **MOST IMPORTANT** to you.

- ☐ Approachable/personable
- ☐ Strong communicator
- ☐ Goal oriented
- ☐ Good listener
- ☐ Humble
- ☐ Honest and ethical
- ☐ Inclusive (seeks broad input in making decisions)
- ☐ Problem solver
- ☐ Resourceful
- ☐ Risk taker
- ☐ Visionary
- ☐ Tenacious (doesn't give up)

Additional Input

What is the single-most important issue you believe the new Superintendent will have to address upon taking the job in Monrovia Unified SD? _____

(Note: Response is limited to 100 characters)

Section 4: Superintendent Searches & Candidate Retention Rates

The following table indicates the Superintendent searches conducted by ESS. Unless noted, all candidates placed by our firm continue to serve in their respective positions.

District	ADA	Superintendent	Hire Date
Huntington Beach Union High School District	15,534 (9-12)	Clint Harwick	January 1, 2017
Acton-Agua Dulce USD	12,532 (K-12)	Larry King	September 18, 2017 (resigned March 2021)
Gustine USD	1,765 (K-12)	Bryan Ballenger	March 1, 2018
Santa Ana USD	46,593 (K-12)	Jerry Almendarez	November 21, 2019
Menifee Union School District	12,142 (K-8)	Jennifer Root	October 19, 2020
Placentia-Yorba Linda Unified School District	24,296 (K-12)	Jim Elsasser Interim Mike Matthews	January 4, 2021 (resigned June 30, 2022) July 1, 2022-June 2023
Huntington Beach City School District	5,588 (K-8)	Leisa Winston	January 4, 2021
Pleasant Valley School District	6,802 (K-8)	Danielle Cortes	June 14, 2021
San Marcos USD	19,894 (K-12)	Andy Johnsen	July 1, 2021
Central School District	4,219 (K-8)	Amy Nguyen-Hernandez	July 1, 2021
West San Gabriel SELPA	9,150 (K-12)	Tamara Schiern	July 1, 2021
Manhattan Beach USD	6,030 (K-12)	John Bowes	July 7, 2021
West Covina USD	14,000 (K-12)	Emy Flores	January 3, 2022
Desert Sands USD	26,300 (K-12)	Kelly May-Vollmar	July 1, 2022
Calexico USD	8,563 (K-12)	Arturo Jimenez	July 1, 2022
Alta Loma School District	5,561 (K-8)	Sherry Smith	July 1, 2022
Lawndale Elementary School District	5,189 (K-8)	Virginia Castro	August 1, 2022
Redlands Unified School District	20,162 (K-12)	Juan Cabral	July 1, 2023
Capistrano Unified School District	47,000 (K-12)	Christopher Brown	July 1, 2023
San Dieguito Union High School District	13,001 (K-12)	Anne Staffieri	July 15, 2023
Calimesa-Redlands-Yucaipa ROP	6,500 (9-12)	Jason Angle	July 21, 2023
Southern California ROC	1,500 (9-12)	Julian Rodriguez	July 31, 2023
Palos Verdes Peninsula Unified School District	10,503 (K-12)	Devin Serrano	August 21, 2023

Section 5: Client References and Guarantee

Below are Board members who have worked directly with our consultants and can speak to ESS's personalized level of commitment, care, and detail in providing search services. Additional *Letters of Endorsement* reflecting client satisfaction with ESS can be found in Appendix A.

Client Reference	Email	Phone
Denise Jaramillo, Superintendent Alhambra USD; SELPA Lead Agent (Los Angeles County)	Jaramillo_denise@ausd.us	626-943-3330
Beckie Cramer, Trustee Pleasant Valley School District (Ventura County)	rcramer@pleasantvalleysd.org	805-427-6041
Ann Phillips, Trustee, Lawndale ESD (Los Angeles County)	Ann_phillips@lawndalesd.org	310-480-6161
Carrie Buck, Trustee Placentia-Yorba Linda USD (Orange County)	cbuck@pylusd.org	714-348-5951
Duane Dishno, Trustee, Huntington Beach Union HSD (Orange County)	ddishno@hbuhdsd.edu	714-292-0632
Jennifer Fenton, Trustee Manhattan Beach Unified SD (Los Angeles County)	JFenton@mbusd.org	310-993-2926

Guarantee

If the newly hired superintendent vacates the position during the first two years of employment and a majority of the Board that selected the superintendent is still in place, ESS will recruit new candidates at no additional cost, barring advertising and other necessary search expenses.

Section 6: Scope of Work/Proposed Fee

Below is a summary of activities to occur within each phase of the Monrovia Unified School District search along with the total fee for the services rendered. In the event the District is looking to reduce costs, ESS will work with the Board on what those options might entail.

Summary of Activities	Proposed Fee
Engagement Phase	
Conduct Superintendent salary study	
Prepare/facilitate Board planning workshop to: review salary data/comps; establish salary parameters; identify education partner focus groups; discuss prospective candidates; confirm timelines and corresponding activities, etc.	
Conduct focus group meetings with education partners (virtual, in-person, and/or telephonic)	
Collaborate with staff to create Superintendent search webpage and update information throughout process	
Activation Phase	
Candidate outreach and communication	
Prepare/distribute on-line survey; disaggregate/analyze results; develop <i>Leadership Profile Report</i>	
Prepare/Present <i>Leadership Profile</i> findings to Board, community, and prospective candidates	
Selection Phase	
Candidate correspondence; applicant screening; reference checks; blind appraisals; preparation of application packets for Board review	
Meet with Board to determine candidate slate; finalize first-level interview questions	
Candidate Interviews (first and second level); Board deliberation; selection of finalist	
Support employment contract negotiations with Board President and legal counsel	
Correspondence with all candidates, develop announcement schedule, draft press release	
Transition Phase	
Facilitate transition meeting with Board and Superintendent	
Other/Miscellaneous	
Weekly updates and outreach with Trustees	
Third-Party due diligence report	
Comprehensive social media review (by third party)	
Travel and expenses	
Total Cost NTE	\$27,500

Section 7: Search Consultant Bios

If ESS is selected to conduct your search, Mr. Richard Tauer will serve as the Lead Adviser and primary point of contact.

Richard V. Tauer
ESS Consultant
Education Support Services Group
RTauer@aalrr.com
626-802-7034



Richard Tauer's 40 years of experience in K-12 education culminated in three years as superintendent. Mr. Tauer's twelve years' extensive experience as a Human Resources administrator was built on a foundation that included elementary, middle, and adult school teaching, graduate-level professor, school principal, as well as director of state and federal programs and compliance.

Prior to joining Education Support Services (ESS), Richard was Superintendent of Westminster School District, where he provided the leadership necessary to successfully navigate the district through the most challenging of fiscal times, while continually making significant progress in student achievement.

Mr. Tauer earned his undergraduate and master's degrees in educational leadership at California State University, Los Angeles, where he also taught numerous graduate-level classes in education leadership, personnel management, and school business.

Mr. Tauer has received many awards during his career, including Administrator of the Year awards at both local and regional levels of Association of California School Administrators, ACSA's state-recognized newsletter award for Region XV, as well as three PTA Council recognition awards during his career.

Richard is a member of American Association of School Administrators and the Association of California School Administrators. As co-director of ACSA's Personnel Academy, Mr. Tauer has access to numerous resources and contacts and potential administrative candidates throughout California.

Richard stays current with emerging trends in education by regularly attending key professional events for California administrators, including the annual superintendents' symposium. He maintains an ongoing relationship with current practitioners in the field, as well as with colleagues who are active consultants in ESS, as well as those in other organizations.

Michael Matthews, Ed.D.
ESS Consultant
Education Support Services Group
michael.matthews@aalrr.com
310-910-3336



Dr. Michael Matthews has more than 35 years of experience in K-12 education, including over 11 years as Superintendent of Manhattan Beach Unified School District. His service also included school principal positions, positions as assistant superintendent, and 10 years as an adjunct professor.

Following undergraduate study at Stanford University, Dr. Matthews earned a master's degree in education and a Single Subject Social Science Teaching Credential at Stanford, as well. He also earned a Preliminary Administrative Services Credential from U.C. Berkeley and a Professional Administrative Services Credential from Pepperdine University. Dr. Matthews also earned his doctorate in Educational and Institutional Management from Pepperdine University.

Dr. Matthews has a strong background in instructional leadership. He served as District spokesperson and as a mentor to school principals. He created additional graduation requirements, focusing on a schoolwide portfolio for all students that included community service, multimedia technology, writing, research, and multi-cultural awareness. He led Malibu High School from a grade 6-9 school of 420 in 1993 to a WASC-accredited grade 6-12 California Distinguished High School of 1300 students in 2004.

Dr. Matthews' diverse backgrounds are responsible for a wide array of successes in varied areas such as human resources, where he led development of new teacher evaluation systems, was responsible for a human resources department overseeing 1500 certificated and classified staff (and continues to mentor human resource professionals); finance and business, where he developed and presented budgets to boards of education and completed multi-million-dollar construction projects on time and on budget; and technology, where he updated technology infrastructure and integrated technology into a curriculum that introduced two new student information systems to districts.

Dr. Matthews is a member and moderator in the Superintendents Consortium 2034 and holds membership in Association of California Supervisors and Administrators. He has been awarded the ACSA Region 14 Superintendent of the Year (2013), District nominee for California Teacher of the Year (1990), and City of Malibu Dolphin Award ("Citizen of the Year") (1997). Under his superintendency, Manhattan Beach USD was named an Apple Distinguished School District (2012-2016), MBUSD also earned multiple California Distinguished School awards, National Blue Ribbon Awards, one National Green Ribbon Award, and numerous other recognitions.

Education Support Services Group

Alan Rasmussen, Ed.D.

Executive Director

Education Support Services Group

arasmussen@aalrr.com

714-907-3634



Dr. Alan Rasmussen has more than 40 years of experience in K-12 education, including 13 years as a superintendent. In addition to his superintendent experience, he has been an Assistant Superintendent for Personnel and Educational Services, elementary and middle school principal, and a classroom teacher.

Following undergraduate study at California State University, Northridge, Dr. Rasmussen received his master's in teacher education from the University of Southern California and a doctoral degree from the University of La Verne. Dr. Rasmussen served as an adjunct faculty member for the University of La Verne's doctoral program in organizational leadership.

In 2001, Dr. Rasmussen received the Gold Award from the California Teachers Association for his support of public education. In 2004, the Association of California School Administrators named him as the Superintendent of the Year for Region IX.

As the founding member of ESS, Dr. Rasmussen has been working with and assisting school boards and superintendents in supporting and building leadership capacities. Areas of focus include board governance training, superintendent evaluations, goal setting, conflict resolution, leadership coaching, policy revisions, human resource audits, and executive searches. In addition, Dr. Rasmussen is a trained presenter and facilitator of interest-based bargaining and has extensive experience working with districts during negotiations.

Appendix A

Client Letters of Endorsement



Board of Trustees

Michael Allman
Phan Anderson
Jane Lea Smith
Rimiga Viskanta
Katrina Young

Superintendent

Anne L. Staffieri, Ed.D.

710 Encinitas Boulevard, Encinitas, CA 92024
Telephone (760) 753-6491
www.sduhsd.net

To Whom It May Concern:

Without reservation, I strongly recommend Education Support Services Group (ESS) to any school district embarking on a superintendent search. We faced a daunting situation with our own search, and I am convinced that the professional expertise of our ESS advisers led directly to our success in securing the best leader for our district.

Over a period of two years, the San Dieguito Union High School District saw its superintendent seat filled by four different individuals. This instability in our top leadership led to tremendous trust issues and low morale throughout our community, and we knew we needed an exceptional leader to help repair relationships and renew our focus. In February of 2023, when our board began the search for a qualified leader to replace our second interim superintendent, it was clear that our success would hinge on the selection of search consultants who could truly understand our community's needs and go the extra mile to attract qualified candidates. Dr. Suzette Lovely and Dr. Gary Rutherford, our ESS advisers, delivered in every way.

From the outset, both Dr. Lovely and Dr. Rutherford made it clear that they were dedicated to our cause. They maintained open lines of communication with all board members and provided regular updates throughout the search process. They fielded questions and concerns from our community and from wary candidates, and they made sure our diverse board maintained a focus on our unifying goal of attracting an experienced leader with a track record of success.

Through a rigorous series of focus groups, town halls and community surveys, Drs. Lovely and Rutherford gathered input from staff, parents, students and involved community members. They sifted through mountains of raw data, identifying common trends and gleaning valuable insights to represent a wide range of perspectives. This led to a well-crafted leadership profile that captured our district's unique challenges, resonated with our collective vision, and provided the foundation for selecting a final slate of qualified candidates to interview.

ESS managed all aspects of the interview process, including planning the logistics with our support staff and ensuring confidentiality for our candidates. This meant that, as trustees, we were able to focus on getting to know the people behind the resumes. Drs. Lovely and Rutherford facilitated our debrief discussions with professionalism and patience, asking thought-provoking questions when needed while fully respecting our role as the decision-making body. The result was a unanimous agreement on an outstanding educational leader for our community.

I appreciated every aspect of our experience with ESS and am pleased to offer them my highest recommendation.

Sincerely,

Jane Lea Smith, Vice President, Board of Trustees

Education Support Services Group



CAPISTRANO UNIFIED SCHOOL DISTRICT

33122 VALLE ROAD, SAN JUAN CAPISTRANO CA 92675
TELEPHONE: (949) 234-9200/FAX: 496-7681 www.capousd.org

BOARD OF TRUSTEES

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GILA JONES

GARY PRITCHARD, PH.D.

SUPERINTENDENT
CHRISTOPHER BROWN ED.D.

January 2, 2024

To Whom It May Concern,

It is my pleasure to recommend Educational Support Services (ESS), and its consultants Dr. Suzette Lovely and Dr. Joseph M. Farley, to any district seeking guidance in selecting a new superintendent. Having participated in three superintendent searches as a long-standing Trustee in the Capistrano Unified School District, I can unequivocally say that ESS's attention to detail and level of support are unsurpassed.

After evaluating proposals and presentations from four search firms, ESS emerged as the frontrunner. Dr. Lovely and Dr. Farley served as trusted facilitators during every step of our selection process, including weekly communication and engagement directly with each Board member. They were excellent at guiding trustees in defining the characteristics we envisioned pertinent in a new superintendent. They organized and conducted numerous input sessions with our vast network of education partners and stakeholders. Through their patient and attentive guidance, a highly effective leadership profile was produced which the Board used as an evaluative tool to interview candidates and ultimately make our final selection.

For our seven-member Board, knowing that Dr. Lovely and Dr. Farley are not only top educational professionals but have honed their expertise serving as highly respected superintendents themselves, was extremely affirming. This proved most useful once interviews were completed and they skillfully guided Board deliberations to winnow the field of candidates. What was most remarkable was how they helped our previously divided Board reach a unanimous decision on the finalist for our next superintendent.

Our experience with ESS was excellent in every regard. In fact, I don't know how we would have chosen a new superintendent without the guidance of Dr. Lovely and Dr. Farley. Please feel free to contact me if you would like more information about our Board's experience with ESS.

Sincerely,

Amy Hanacek

Mrs. Amy Hanacek

Trustee, Capistrano Unified School District

SERVING THE COMMUNITIES OF:
ALISO VIEJO • COTO DE CAZA • DANA POINT • LADERA RANCH • LAGUNA NIGUEL • LAS FLORES • MISSION VIEJO
RANCHO MISSION VIEJO • RANCHO SANTA MARGARITA • SAN CLEMENTE • SAN JUAN CAPISTRANO



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Superintendent

Lizette Diaz

Assistant Superintendent,

Student Achievement /

Educational Services

Michelle Dynes

Assistant Superintendent,

Human Resources /

Safety Preparedness

Lori L. Isom

Assistant Superintendent,

Business Services

There is no more important undertaking for a board of trustees than the search and hiring of a new superintendent. The Central School District has been fortunate to have had many years of stability, and our most recent superintendents have all come from within the organization. This made the task even more daunting for us. It was critical that we found a search firm that could help us find the perfect match for our district and its needs.

The Education Support Services Group became that firm for us. Having known Dr. Gary Rutherford for many years in mutual groups within the county, there was a fantastic basis of trust. Dr. Suzette Lovely was the perfect partner and the two were able to work together to determine the interests and needs of our district and reach out to those that could meet those needs.

The multi-step approach to the search was thorough in every detail. A clear overview of the services that would be provided allowed us to know every step of the process. The four phases, Engagement, Activation, Selection and Transition helped us as a district to determine our focus, refine our priorities and hear from all stakeholders. The board was involved in each phase and had input on everything from questions to be asked, whom to reach out to and timelines that would be most effective. Drs. Rutherford and Lovely provided frequent updates and were available anytime the need for clarification or concerns arose.

As president, what I most appreciated was the personal care that was taken to make sure that every trustee was involved, and their concerns and priorities were heard. No issue was too small or deemed inconsequential. There was a mutual goal to find just the right person to take us into the future. Every effort was taken to ensure that we got to that result. Having ESS to do the candidate screening, background checks and their knowledge of local professionals was a great reassurance to us as trustees, as there is no more valuable asset than the reputation of the district.

Our district is excited as we anticipate the future with our new superintendent. We look forward to forming a new governance team and know that we can reach out to ESS should the need arise. Drs. Rutherford and Lovely took an overwhelming task and made it a very positive experience for us as a leadership team. We are unified and ready to move into the future with great confidence for success for all stakeholders.

Kathy Thompson
President, Board of Trustees
909-241-5754



Superintendent Search Proposal for



January 10, 2024



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Search Firm and Consultant Contact Information



Lead Consultants

Peggy Lynch, Ed.D.

760.519.8506

plynch@leadershipassociates.org

David Verdugo, Ed.D.

562.810.6249

dverdugo@leadershipassociates.org

Leadership Associates

449 W. Foothill Blvd., #427

Glendora, CA 91741

916-520-4951

www.leadershipassociates.org



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Glendora, CA 91741
(916) 520-4951

www.leadershipassociates.org

ERIC ANDREW ♦ KENT BECHLER ♦ WILLIAM BANNING ♦ JAMES BROWN ♦ BLANCA CAVAZOS ♦ TOM CHANGNON ♦ MARC ECKER ♦ DONALD EVANS ♦ RICHARD FISCHER ♦ SALLY FRAZIER ♦ JUAN GARCIA ♦ JACQUELINE HOBBS ♦ PEGGY LYNCH ♦ MIKE MILLER ♦ DENNIS SMITH ♦ RICH THOME ♦ SANDY THORNTON ♦ DAVID VERDUGO

SENT VIA EMAIL

January 10, 2024

Jennifer Anderson, Board President
Monrovia Unified School District
325 East Huntington Drive
Monrovia, CA 91016

Dear President Anderson and Monrovia Unified School District Board of Trustees:

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

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

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

Our work includes partnering with Boards in several similar and/or nearby districts such as Newport-Mesa USD, La Habra City Schools, Brea-Olinda USD, Fullerton Joint UHSD, and Buena Park School District. Through the continued participation of several of our partners in education organizations such as the California Collaborative for Educational Excellence (CCEE) and the California County Superintendents Educational Services Association (CCSESA), we have remained current on key education policy and system wide developments including Local Control and Accountability Plan (LCAP) and Local Control Funding Formula (LCFF) legislation. We have a strong record of success in helping districts find superintendents who meet the profile developed by the Board with extensive engagement from staff, parent leaders and community led by Leadership Associates.

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

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

- Rich History
- Academic Programs
- Technology Integration
- Arts & Extracurricular Opportunities
- Focus On Diversity, Equity and Inclusion
- Exemplary Educators
- Student Centered Culture
- Engaged Parents, Families and Community

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

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

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

Respectfully,



Dr. Peggy Lynch
Lead Consultant
Leadership Associates



Dr. David Verdugo
Lead Consultant
Leadership Associates



EXECUTIVE SUMMARY

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

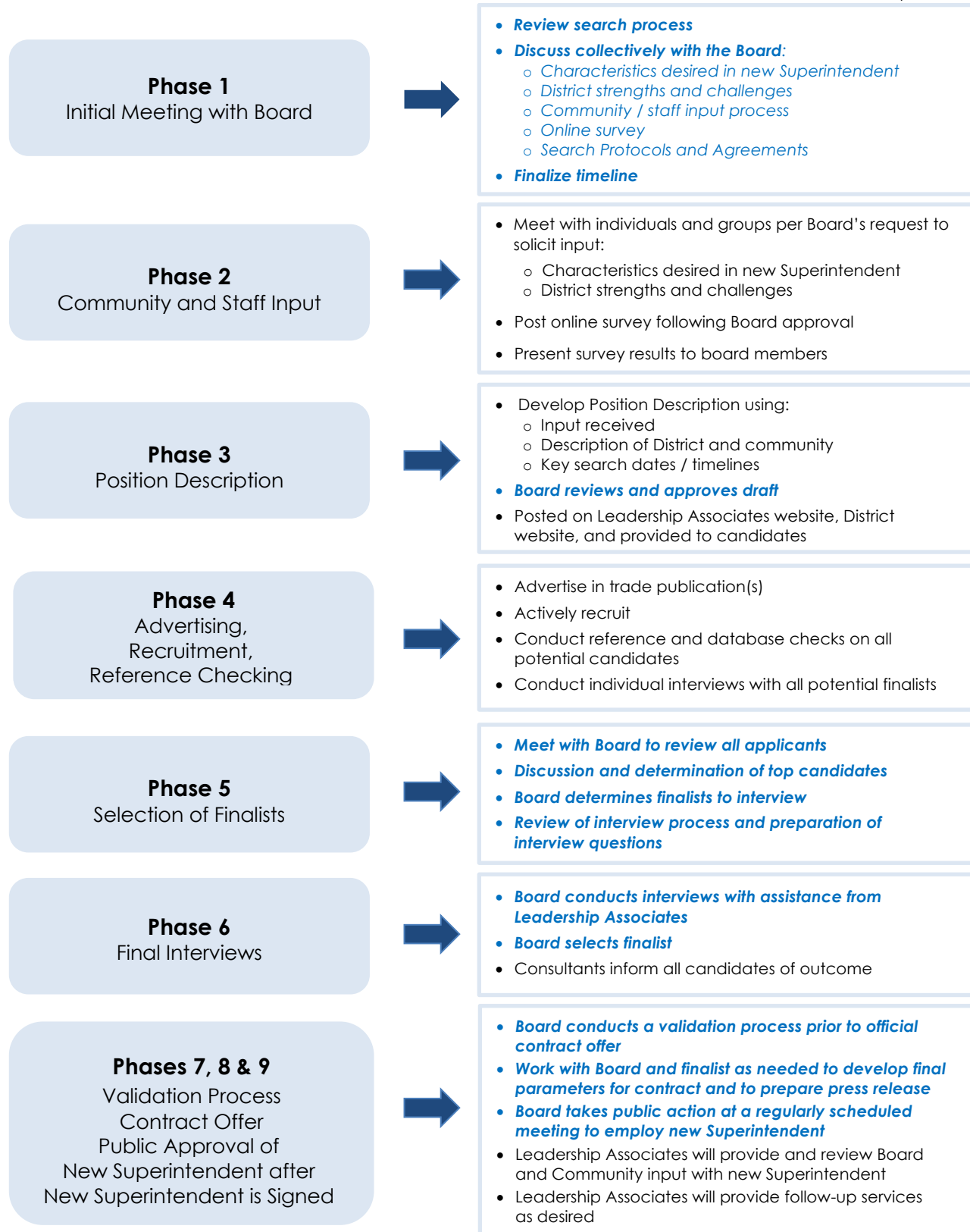
1. We view each district as unique and therefore work as partners with the Board to develop a customized approach that the Board may use to select its new superintendent.
2. We have developed processes that lead to the successful hiring of candidates who meet the profile developed by the Board. These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

In conclusion, we strongly believe Leadership Associates is the right match for your district. The superintendent position is one of the most challenging leadership positions in this country. It demands a unique knowledge base and skill set. The new superintendent will need to inspire the confidence of teachers, parents, and community leaders, build on the good work done by so many, but never be afraid to challenge everyone to do better and encourage innovative thinking wherever possible. We are the firm that will help the Board find that leader.



SUPERINTENDENT SEARCH PROCESS FLOW CHART

Note: *Blue italicized text* indicates Board Participation





SEARCH PROCESS PLAN

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

****Indicates meetings with the Board***

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

Leadership Associates will confer with the Board upon our selection to represent your district. At this meeting we will discuss all matters addressed in the Request For Proposal (RFP) Scope of Services, including: the characteristics the Board is seeking in the next superintendent; District strengths and challenges; the process for engaging groups and individuals in the search process; approval of an official timeline and meeting dates; Board and Search Firm protocols during the search; possible contract parameters for the new superintendent; potential internal candidates; the Board's liaison with Leadership Associates and spokesperson for the Board; and all other matters addressed in the RFP Scope of Services. We will also be prepared to suggest criteria for consideration based on our own professional expertise. Immediately following the initial meeting, we will work with district staff to create a Superintendent Search webpage on the district's website where members of the community can receive updates on the search process, including access to online surveys.

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

After working with the Board to develop a community engagement plan, we confer with the individuals and groups you request (community, staff, students). We share the search process, timeline, answer questions, and solicit input regarding the desired qualities, characteristics, background, and experiences of the new superintendent, and we discuss the key characteristics of the District's culture, strengths, and future challenges and issues. We spend the time necessary to ensure full input. If individuals are unable to attend the meetings, but would like to provide additional information, or prefer to submit their ideas in a different format, opportunities are provided to contact us via email or telephone. We also have an online survey that can be posted in various languages on the District website to encourage broader participation of staff and community. We prepare a thorough report containing the comments from each group, individuals, and the survey, and send it to Board members approximately one week after the input. We follow up with you after you receive the report to review any questions you have.

Phase 3: Position Description (Key Personnel: Consultants, LA / district admin. support)

The Position Description will clearly state the criteria which applicants for the position should address in completing their application. It will also reflect input received on qualities and characteristics desired, a description of the District and community, and key search dates. The Board reviews the draft and makes changes before the description is finalized. The description is posted on our website, distributed widely, and can be posted on the District's website.

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

After our sessions with the Board, staff and community, we advertise and actively recruit both statewide and nationally. We send a notification to over 1,100 subscribers to our website announcing the position. We will also conduct reference and database checks on all potential candidates. All partners participate in this process in order to take advantage of our extensive state and national network. These are very critical activities as we work diligently to find the



candidates that best match those qualities and characteristics on the Position Description. We verify degrees, credentials and professional experiences. We do extensive confidential reference checking including conversations with people not listed on the candidate's application. We keep the Board informed on a regular basis about the progress of the search.

Phase 5: *Selection of Finalists (Key Personnel: Consultants, Board, LA / district admin. support)

At this Closed Session meeting, we will review and discuss all applicants, recommend candidates you should consider interviewing, and explain our rationale for recommending some and not others. We will provide a tiered ranking of candidates for your review. The Board, however, makes the final decision on those to be interviewed and determines the interview schedule and location. We offer sample interview questions developed by consultants and assist the Board in finalizing them with a focus on the specific needs of the District as gleaned from the input process and reflected in the position description. In addition to making interview arrangements with the candidates, we provide all the materials the Board needs for the interview and make logistical arrangements in coordination with the superintendent's assistant or designated district liaison.

Phase 6: *Final Interviews (Key Personnel: Consultants, Board, LA / district admin. support)

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

Phase 7: Validation Process; Contract (Key Personnel: Consultants, Board, LA / district admin. support)

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

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

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

Phase 9: After the New Superintendent is Signed (Key Personnel: Consultants, New Superintendent)

We provide and review with the new superintendent the Board and community input. We are available to provide additional follow up services as desired. These services could include developing a 90-day transition plan and an initial workshop for the governance team to establish goals for the new superintendent, and the superintendent's evaluation process.

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



PROPOSED TIMELINE

(Flexible based on Board direction)

Monrovia Unified School District Superintendent Search

Note: *Blue italicized text* indicates Board Participation

JANUARY 2024 Preliminary Phase	January 10	District receives proposals
	January 18	<i>Proposal Presentations / Board Selects Firm</i>
FEBRUARY 2024 Community Engagement	Early February (Special Mtg)	<i>Initial Meeting with the Board; Board determines characteristics, skills & qualities desired in new superintendent; publicly announces timeline and procedures (Open and Closed Session; approx 3 hrs total)</i>
	February 19-March 1	Online survey dates
	February 19-23, 2024	Consultants confer with staff and community designated by the Board to receive input
FEBRUARY-MARCH 2024 Advertisement and Recruitment	February	Consultants identify potential candidates; Development and posting of recruitment materials and Position Description
	February 12 and 26, 2024	Advertising and active recruitment; Ad appears in <u>EdCal</u> , (Two consecutive publications)
	March 8, 2024, 5:00 PM	Deadline for applications
MARCH-APRIL 2024 Interviews and Selection	March	Consultants complete comprehensive reference and background checks on applicants
	Week of March 25, 2024 (Special Mtg)	<i>Board confers with consultants, reviews all applications and selects candidates to be interviewed (Closed Session; approx 3 hours)</i>
	April 13, 2024 (Special Mtg)	<i>Board interviews candidates; selects finalist(s) (Closed Session; all-day meeting)</i>
APRIL-MAY 2024 Contract Approval	Week of April 22, 2024	<i>Board completes the validation process of the leading candidate and makes final determination</i>
	May Board Meeting	<i>Board approves superintendent contract at a regularly scheduled board meeting</i>
JULY 2024 Start Date	July 1, 2024 (as mutually agreed)	New superintendent begins



FEE AND SUMMARY OF SERVICES

MONROVIA UNIFIED SCHOOL DISTRICT SUPERINTENDENT SEARCH

TOTAL FEE TO CONDUCT SEARCH: \$25,500 (all-inclusive)

This fee includes:

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

GUARANTEE

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



SAMPLE SERVICES AGREEMENT

LEADERSHIP ASSOCIATES

www.leadershipassociates.org

449 W. Foothill Blvd., #427

Glendora, CA 91741

(916) 520-4951

AGREEMENT FOR CONSULTANT SERVICES

THIS AGREEMENT is made this ____ **day of January 2024** between **LEADERSHIP ASSOCIATES**, hereinafter called the Contractor, and **MONROVIA UNIFIED SCHOOL DISTRICT**, hereinafter called the District.

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

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

The District agrees to pay the Contractor **TWENTY-FIVE THOUSAND FIVE HUNDRED DOLLARS (\$25,500)** for services provided. Payment is to take place in two increments: **(1) \$12,750** upon completion of educational partner input, and **(2), \$12,750** upon selection of a finalist. The Contractor will submit invoices to the District for each of the payment increments. Payments are due within 30 days of receipt of invoice.

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

The Contractor is to perform the above services beginning January __, 2024.

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

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

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

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

DISTRICT:
MONROVIA UNIFIED SCHOOL DISTRICT

By: _____

By: _____

Name: Betty Hall

Name: _____

Dept: Fiscal Services

Title: _____

Date: _____

Date: _____



REFERENCES

MONROVIA UNIFIED SCHOOL DISTRICT SUPERINTENDENT SEARCH

	DISTRICT NAME AND ADDRESS	CONTACT NAME	TITLE	PHONE	EMAIL
1	Fontana USD 9680 Citrus Ave Fontana, CA 92335	Marcelino Serna	Board President	(909) 600-9027	Marcelino.Serna@fUSD.net
2	Brea Olinda USD 1 Civic Center Cir Level 2 Brea, CA 92821	Carrie Flanders	Board President (at time of search)	(714) 933-7925	cflanders@bousd.us
3	Charter Oak USD 20240 E Cienega Ave Covina, CA 91724	Jeanette Flores	Board President (at time of search)	(636) 966-8331	jflores@cousd.net
4	ABC USD 16700 Norwalk Blvd. Cerritos, CA 90703	Soo Yoo	Board President (at time of search)	(562) 926-5566	soo.yoo@abcusd.us
5	Buena Park SD 6885 Orangethorpe Ave Buena Park, CA 90602	Rhodia Shead	Board President (at time of search)	(714) 522-8412	rshead@bpsd.us



QUALIFICATION STATEMENT

EXPERIENCE AND QUALIFICATIONS OF THE FIRM

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

A few other facts about the partners of the firm:

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



DIVERSITY AND EQUITY STATEMENT

Our Commitment

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

Diversity Policy

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

Equity

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



PARTNER QUALIFICATIONS

QUALIFICATIONS OF LEAD CONSULTANTS

Peggy Lynch, Ed.D. – Partner

Peggy served as Superintendent for San Dieguito Union High School District in San Diego County until her retirement in April 2008. She also served as Superintendent of the Brea Olinda Unified School District in North Orange County for seven years, part of her nearly 14 years serving as a superintendent. Peggy has experience conducting executive searches since 2009, and has facilitated or assisted in the facilitation of more than 60 executive searches. She received her doctorate from the University of La Verne, her Master's Degree from Fullerton and her Bachelor's Degree from Parsons College in Iowa. Peggy chaired the ACSA Orange County and San Diego County Superintendents, was chair of the ACSA Superintendents' Symposium and ACSA's State Annual Conference. Peggy has received recognition from various organizations, including Southern California Women in Educational Management, Stanford University School of Engineering and the PTA. She has also co-authored several books, including *Effective Superintendent-School Board Practices; The Superintendent's Planner, A Monthly Guide and Reflective Journal*; and *Eight at the Top: A View Inside Public Education*.

David J. Verdugo, Ed.D. – Partner

David served as Superintendent for the Paramount Unified School District (17,000 ADA) in Los Angeles County for 9 years. He also served as Assistant Superintendent of the Placentia-Yorba Unified School District (25,000 ADA, Director of Secondary Education, Principal at both Elementary and High School levels, teacher, and coach. He has a total of 43 years in the field of education spanning Grades K-12. His duties have included school facility management, extensive involvement with budget development, implementation of technology programs, employer/employee relations, curriculum and instructional strategies, and organizational development. His experience includes serving students of diverse populations and socioeconomic levels in urban and suburban settings. He was named the Association of California Administrators (ACSA) Region XIV Superintendent of the Year; received the California State University, Long Beach Outstanding Superintendent Leadership Award in 2012; the ALAS, Association of Latino Administrators and Superintendents; National Outstanding Educator Award in 2013; and, in 2020, was inducted into the University of Southern California USC Rossier School of Education "Hall of Fame", making him only the 23rd recipient of this prestigious award. He earned his Bachelor's Degree from Whitworth College in Spokane, Washington and his Master's Degree from the University of La Verne. His Doctoral Degree in Educational Administration was earned at the University of Southern California. Dr. Verdugo is a past Governing Board member to AASA and has addressed and spoken on State and National topics from building a case for reform to the importance of Arts in schools. He was the Executive Director of the California Association of Latino Superintendents and Administrators (CALSA) until 2019, as well as the former Superintendents' Leadership Academy Director for the Association of Latino Administrators and Superintendents (ALAS) based in Washington, D.C.

QUALIFICATIONS OF SUPPORTING CONSULTANTS

Eric D. Andrew, Ed.D. – Partner

Dr. Andrew began his education career in 1979 as a teacher in Claremont Unified School District, where he taught students in kindergarten through sixth grade, and later became a site principal for elementary, middle and high school levels. Dr. Andrew served as Director of Student Services in Redlands Unified School District, served as an Assistant Superintendent of Educational Services in Glendora Unified School District, and later became Superintendent of the Campbell Union School District, a position he held for seven and a half years. Dr. Andrew is currently the President of the Region 8 Retiree Charter, a Region 8 Executive Consultant, and is on board California Association of African American School Administrators (CAAASA) and Santa Clara County Alliance of Black Educators (SCCABE). He also serves as an active member of the California Association of Latino School Administrators (CALSA). As a well-respected equity-focused administrator and instructional leader, he has earned several distinctions, including being named a finalist for the National Association of School Superintendents (NASS) Superintendent of the Year (2017). Dr.

Andrew has been recognized by the Association of California School Administrators (ACSA) as the Region 8 Superintendent of the Year (2014), the State and Region 15 Central Office Administrator of the Year (2009), and the Region 12 Pupil Services Administrator of the Year award (2005). He holds a master's in education from Cal-Poly, Pomona, an administrative credential from Cal State San Bernardino and a doctorate in education from the University of LaVerne.

William Banning – Partner

William Banning served as Superintendent of the Goleta Union School District from July 2012 through his retirement in June 2017. He is currently a member of the Board of Trustees in the Santa Barbara Unified School District. He served as an Interim Superintendent (2018-19) and Board consultant (2019-20) in the Vista Del Mar Union School District and has supported aspiring educational leaders as a coach and lecturer in the Santa Barbara County Education Office's Preliminary and Clear Administrative Services Credentialing programs. He holds master's degrees in organizational leadership and educational Administration. His 40-year career includes work in Administrative Services and Human Resources in the Solana Beach School District. He also served as a principal in elementary and secondary schools in the Fallbrook Union Elementary School District. His teaching experience includes elementary and junior high school music instruction in Capistrano Unified School District, high school music in the Escondido Union High School District, middle school computer science instruction in the Fallbrook Union Elementary School District, and Research Statistics at California State University, San Marcos. Mr. Banning has been recognized by the Association of California School Administrators (ACSA) as the Region 13 recipient of the Leadership Matters Award in 2014 and 2017. He and his wife, Becky, live in Santa Barbara, California. They have three grown children.

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

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

Blanca Cavazos, Ed.D., – Partner

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

Tom Changnon – Partner

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

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

Marc retired in December 2014 as Superintendent of the Fountain Valley School District for 18 ½ years in that position. He served as Chair of the Orange County Special Education Alliance and is a past president of the Orange County Superintendents' Organization. Marc is a past State President of the Association of California School Administrators (ACSA) and served as the Interim Executive Director for 2021-22. He served with other leading superintendents in providing input and advice on the development of the Local Control Funding Formula to the Governor and his staff. He also served on the State Public Schools Accountability Act Advisory Committee and two terms on the Financial Crisis Management Assistance Team Advisory Board. Marc is the financial officer for the California League of Schools and served as president of the Association of Middle Level Education. He is a full-time faculty member at California State University, Fullerton in the position of Distinguished Professor in the College of Education. He directs the ACSA mentor program and is a sitting Executive Member of the Schools First Federal Credit Union Board of Directors. Marc received his Bachelor's Degree from UCLA, his Master's Degree from California State University, Fullerton and his Doctorate from Alliant University.

Donald Evans, Ed.D. – Partner

Donald Evans, Ed.D. served as the superintendent of Berkeley Unified School District for six years before retiring in 2019. Dr. Evans came out of retirement for 2022-23 to serve as Interim Superintendent for Piedmont Unified School District. Prior to Berkeley Unified School District, he was the Superintendent of Hayward Unified School District. During his tenure in Berkeley, Dr. Evans was Superintendent of the Year for the California Association of African American Superintendents and Administrators. Dr. Evans started his education career in 1988 in San Diego Unified School District where he taught grades 4-6 and later became vice principal of an elementary school. He served as principal in Ravenswood and Area Superintendent/Network Officer in Oakland Unified School District. He was the Associate Superintendent of Secondary Education for Compton Unified School District. Dr. Evans received his BA from University of Delaware and MA from United States International University and earned his Doctorate of Education from the University of California, Berkeley. Dr. Evans has led many initiatives and reforms. His areas of expertise include school systems and management, multi-tiered systems for students, community engagement and managing complex political issues in school environments. After retiring, Dr. Evans worked with the California Collaborative for Educational Excellence that supports local educational agencies (LEAs). He also provided executive coaching for new superintendents and district leaders in the Bay Area. In 2022, Dr. Evans joined California State University, East Bay as a Lecturer.

Richard Fischer – Partner

Rich served as Superintendent of Schools for 19 years in the Mountain View Los Altos Union High School District, Lake Tahoe Unified School District and the Harmony Union School District. He currently serves as Director of the Executive Leadership Center and is also a member of the El Dorado County Board of Education. Rich has been Director for the ACSA Superintendents' Academy and presenter and trainer for

California Association of School Business Officials, California Foundation for Improvement of Employer-Employee Relations (CFIER), California State Superintendents' Symposium, El Dorado County Instructional Leaders - Series on Effective Leadership Techniques, Leadership Mountain View, and California School Leadership Academy. He has been honored as ACSA Regions 1,2,3 Superintendent of the Year and Administrator of the year as well as being named Los Altos of the Year in 2006. Rich received his Bachelor of Arts Degree from California State University, Northridge and his Master's Degree from California State University, Sacramento.

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

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

Juan Garza – Partner

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

Jacqueline Horejs, Ed.D. – Partner

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

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

Dennis served as Superintendent of Schools for the Placentia Yorba Linda Unified School District (27,000 ADA) in Orange County for 12 years prior to his retirement. He also served as superintendent of the Orange County Public Schools in Orlando, Florida, the 16th largest school district in the United States. Prior to that, he served as superintendent of the Irvine Unified, Cajon Valley Union and Laguna Beach Unified School Districts. Dennis served a total of 26 years as a Superintendent of Schools. Dennis has experience conducting executive searches since 2005 and has facilitated or assisted in the facilitation of more than 85 executive searches. Dennis was recognized as one of the top 100 Executive Educators in North America by the National School Boards Association, one of the 89 Rising Stars to Watch by the Los Angeles Times, one of the 100 Most Influential Business Leaders in Central Florida by the Orlando Business Journal, and the ACSA Region XVII Superintendent of the Year. He also served as President of the Southern California

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

Rich Thome – Partner

Rich Thome served as Superintendent of the South Bay Union and Cardiff School Districts in San Diego County, as well as the Assistant Superintendent of Technology and Human Resources at the San Diego County Office of Education. He is a Partner in Leadership Associates, a Superintendent Search Firm. In these capacities he has conducted over 139 executive searches, including 100 Superintendent searches, 39 Administrative searches (non-superintendent), and 203 Board Workshops since 2003. Rich joined Leadership Associates and has been in the firm for 17 years, joining in 2006 as a search consultant. Of these searches, Rich has conducted 54 Superintendent searches in Unified School District, 15 in High School Districts and 31 in Elementary School Districts. He also served as Director, Professional Learning in the Mobile Technology Learning Center (MTLC), a research center in the School of Leadership and Education Sciences (SOLES), at the University of San Diego. He, prior to that assignment, served as Director Educational Leadership Development Center at the University. In addition, Rich was an Executive Coach for Pivot Learning Partners in Los Angeles and San Diego Counties. Previously, he served for 23 years in the (now 49,974 enrollment) Capistrano Unified School District as Assistant Superintendent in charge of 29 elementary schools, Director, Elementary Education Coordinator, Research and Instructional Technology, Elementary Principal and High School Teacher. Prior to that Rich served as a Middle School Teacher in the Pasadena Unified School District. He received his bachelor's degree from California State University, Los Angeles, and his master's from Pepperdine University. He is fluently bilingual in Spanish and received his Bilingual, Cross Cultural Specialist credential in California. Rich was awarded the prestigious Ohtli Award, awarded rarely by the Government of Mexico in 2008 for his 40 years of services to the Latino Community. In 2007 Rich was awarded the Excellence in Leadership Award by the University of California, San Diego and in 2006 he was awarded the Willie Velasquez Community Service Award. He has received the Honorary Service Award from the California Congress of Parents, Teachers and Students, and the Orange County Hispanic Educator of the Year Award.

Sandy Sánchez Thorstenson – Partner

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



EXECUTIVE SEARCHES 2013-CURRENT

STATEWIDE

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

POSITION: COUNTY OFFICE OF EDUCATION SUPERINTENDENT

- | | |
|------------------------------|----------------|
| 1. Los Angeles County – 2011 | 1,500,000+ ADA |
| 2. Santa Clara County – 2008 | 275,000+ ADA |
| 3. Ventura County – 2021 | 135,312 ADA |
| 4. Yuba County – 2023 | 15,000 ADA |

POSITION: SCHOOL DISTRICT SUPERINTENDENT (2013-Current)

<u>District</u>	<u>County</u>	<u>ADA</u>
1. Fresno USD	Fresno	73,356
2. San Francisco USD	San Francisco	58,865
3. Santa Ana USD	Orange	57,410
4. Capistrano USD	Orange	53,833
5. Corona-Norco USD	Riverside	53,148
6. Sacramento City USD	Sacramento	47,616
7. Oakland USD	Alameda	46,486
8. Riverside USD	Riverside	42,560
9. Stockton USD	San Joaquin	40,984
10. Fontana USD	San Bernardino	35,461
11. San Jose USD	Santa Clara	32,938
12. Anaheim Union HSD	Orange	32,085
13. San Ramon Valley USD	Contra Costa	31,900
14. Mt. Diablo USD	Contra Costa	31,013
15. West Contra Costa USD	Contra Costa	30,596
16. Bakersfield City SD	Kern	30,262
17. Modesto City Schools	Stanislaus	30,718
18. Orange USD	Orange	28,522
19. Saddleback Valley USD	Orange	27,803
20. East Side UHSD	Santa Clara	26,537
21. Rialto USD	San Bernardino	26,468
22. Placentia-Yorba Linda USD	Orange	25,821
23. Palm Springs USD	Riverside	23,332
24. Murrieta Valley JUSD	Riverside	22,950
25. Antelope Valley UHSD	Los Angeles	22,792
26. Tustin USD	Orange	22,761
27. Grossmont UHSD	San Diego	22,021
28. Lake Elsinore USD	Riverside	22,000
29. Hemet USD	Riverside	21,977
30. Pajaro Valley USD	Santa Cruz	20,438
31. Folsom-Cordova USD	Sacramento	19,865
32. Anaheim City SD	Orange	19,312
33. Alvorad USD	Riverside	19,255
34. ABC Unified	Los Angeles	18,889
35. Coachella Valley USD	Riverside	18,861
36. Riverbank USD	Stanislaus	18,750
37. Newport-Mesa USD	Orange	18,559
38. Antioch USD	Contra Costa	18,352
39. Panama-Buena Vista Union SD	Kern	18,250
40. Ventura USD	Ventura	17,430
41. Santa Rosa City Schools	Sonoma	16,700
42. Santa Maria-Bonita SD	Santa Barbara	16,665
43. Oxnard SD	Ventura	16,533
44. Burbank USD	Los Angeles	16,207
45. Cajon Valley Union SD	San Diego	16,059
46. Santa Clara USD	Santa Clara	15,509
47. Lancaster SD	Los Angeles	14,743

<u>District</u>	<u>County</u>	<u>ADA</u>
48. Walnut Valley USD	Los Angeles	14,658
49. Vallejo City USD	Solano	14,554
50. West Covina USD	Los Angeles	14,402
51. Fullerton JHSD	Orange	13,661
52. Etiwanda SD	San Bernardino	13,478
53. Livermore Valley USD	Alameda	13,305
54. Paramount USD	Los Angeles	13,160
55. Sanger USD	Fresno	13,087
56. Vacaville USD	Solano	12,561
57. Inglewood USD	Los Angeles	12,570
58. Acton-Agua Dulce USD	Los Angeles	12,523
59. San Dieguito UHSD	San Diego	12,485
60. Palo Alto USD	Santa Clara	12,357
61. Natomas USD	Sacramento	12,300
62. Metropolitan Education	San Jose	12,000
63. Oak Grove SD	Santa Clara	11,800
64. Upland USD	San Bernardino	11,665
65. Victor ESD	San Bernardino	11,531
66. San Lorenzo USD	Alameda	11,530
67. Evergreen School District	Santa Clara	11,385
68. Alameda USD	Alameda	11,299
69. Franklin-McKinley SD	Santa Clara	11,269
70. Gilroy USD	Santa Clara	11,164
71. Merced City USD	Merced	11,009
72. Lucia Mar USD	San Luis Obispo	10,710
73. Pittsburg USD	Contra Costa	10,560
74. Azusa USD	Los Angeles	10,518
75. Berkeley USD	Alameda	10,340
76. Sequoia UHSD	San Mateo	10,032
77. Dublin USD	Alameda	10,000
78. Roseville City ESD	Placer	9,943
79. Los Alamitos USD	Orange	9,833
80. San Mateo Union HSD	San Mateo	9,760
81. Woodland JUSD	Yolo	9,658
82. Yucaipa---Calimesa Joint USD	San Bernardino	9,655
83. Ocean View SD	Orange	9,461
84. Lompoc USD	Santa Barbara	9,644
85. Escondido UHSD	San Diego	9,458
86. Santa Monica-Malibu USD	Los Angeles	9,121
87. Morgan Hill USD	Santa Clara	9,022
88. Santa Maria JHSD	Santa Barbara	7,633
89. East Whittier City ESD	Los Angeles	8,829
90. Davis Jt. USD	Yolo	8,626
91. Sylvan Union SD	Stanislaus	8,261
92. Westminster SD	Orange	8,203
93. Novato USD	Marin	8,078
94. El Rancho USD	Los Angeles	7,985
95. South Bay UESD	San Diego	7,682
96. San Rafael City Schools	Marin	7,200
97. Santa Cruz City Schools	Santa Cruz	7,092
98. Newhall SD	Santa Clarita	6,831
99. Cotati-Rohnert Park USD	Sonoma	6,373
100. Fountain Valley USD	Orange	6,337
101. Selma USD	Fresno	6,258
102. Lennox SD	Los Angeles	6,247
103. Ukiah USD	Mendocino	6,214
104. Brea Olinda USD	Orange	6,085
105. Patterson JUSD	Patterson	6,012
106. Newhall SD	Los Angeles	5,920
107. Alta Loma SD	San Bernardino	5,900
108. Perris ESD	Riverside	5,639
109. Santa Paula USD	Ventura	5,454
110. Monrovia USD	Los Angeles	5,404

<u>District</u>	<u>County</u>	<u>ADA</u>
111. Kerman USD	Fresno	5,310
112. Newark USD	Alameda	5,173
113. Sierra Sands USD	Kern	5,100
114. Orcutt Union ESD	Santa Barbara	5,087
115. Fallbrook SD	San Diego	4,921
116. Oakley Union SD	Contra Costa	4,871
117. Buena Park SD	Orange	4,684
118. Moreland SD	Santa Clara	4,670
119. Charter Oak USD	Los Angeles	4,581
120. Sonoma Valley USD	Sonoma	4,564
121. Oak Park USD	Ventura	4,527
122. Benicia USD	Solano	4,526
123. San Lorenzo Valley USD	Santa Cruz	4,444
124. Belmont-Redwood Shores SD	San Mateo	4,308
125. Wiseburn USD	Los Angeles	4,301
126. Ravenswood City SD	San Mateo	4,296
127. Paradise USD	Butte	4,261
128. Duarte USD	Los Angeles	4,247
129. Martinez USD	Contra Costa	4,156
130. Lindsay USD	Tulare	4,150
131. Central UHSD	Imperial	4,104
132. Cypress SD	Orange	4,000
133. Brawley ESD	Imperial	3,980
134. Eureka City Schools	Humboldt	3,884
135. Lake Tahoe USD	El Dorado	3,872
136. Enterprise ESD	Shasta	3,846
137. Hanford Joint Union HSD	Kings	3,802
138. Amador County USD	Amador	3,829
139. Lemon Grove SD	San Diego	3,797
140. Mountain View-Los Altos UHSD	Santa Clara	3,753
141. Fillmore USD	Ventura	3,734
142. Goleta Union SD	Santa Barbara	3,718
143. Del Norte County USD	Del Norte	3,591
144. Los Altos SD	Santa Clara	3,576
145. Cabrillo USD	San Mateo	3,357
146. Cambrian SD	Santa Clara	3,349
147. Lafayette SD	Contra Costa	3,261
148. Corcoran USD	Kings	3,257
149. Pacifica SD	San Mateo	3,150
150. San Marino USD	Los Angeles	3,146
151. Exeter Public Schools	Tulare	3,000
152. Standard ESD	Kern	2,979
153. South Whittier ESD	Los Angeles	2,918
154. San Bruno Park ESD	San Mateo	2,785
155. Oroville City ESD	Butte	2,696
156. Castaic Union SD	Los Angeles	2,568
157. Fowler USD	Fresno	2,562
158. Scotts Valley USD	Santa Cruz	2,482
159. Jefferson SD	San Joaquin	2,477
160. Carmel USD	Monterey	2,468
161. Farmersville USD	Tulare	2,463
162. Bear Valley USD	San Bernardino	2,453
163. Oroville UHSD	Butte	2,427
164. Mill Valley SD	Marin	2,415
165. Piedmont USD	Alameda	2,349
166. Ojai USD	Ventura	2,301
167. Galt JUHSD	Sacramento	2,287
168. Lammersville JUSD	San Joaquin	2,200
169. Chowchilla ESD	Madera	2,193
170. Woodlake USD	Tulare	2,192
171. Red Bluff Union ESD	Tehama	2,178
172. Plumas USD	Plumas	2,130
173. Fort Bragg USD	Mendocino	1,917

<u>District</u>	<u>County</u>	<u>ADA</u>
174. Willits USD	Mendocino	1,907
175. Mariposa County USD	Mariposa	1,816
176. Pacific Grove USD	Monterey	1,812
177. Byron Union SD	Contra Costa	1,686
178. Reed Union SD	Marin	1,556
179. Larkspur-Corte Madera SD	Marin	1,523
180. Colusa USD	Colusa	1,450
181. Golden Plains USD	Fresno	1,424
182. Chawanakee USD	Madera	1,423
183. Williams USD	Colusa	1,375
184. Las Lomitas ESD	San Mateo	1,336
185. Sierra USD	Fresno	1,323
186. St. Helena USD	Napa	1,295
187. Guadalupe Union SD	Santa Barbara	1,280
188. Palermo SD	Butte	1,278
189. Wilsona SD	Los Angeles	1,228
190. Fall River JUSD	Shasta	1,209
191. Kentfield SD	Marin	1,177
192. Chowchilla UHSD	Madera	1,103
193. Taft UHSD	Kern	1,045
194. Aromas-San Juan SD	San Benito	1,024
195. University Preparatory School	Shasta	900
196. Bass Lake JUSD	Madera	891
197. Lassen UHSD	Lassen	825
198. Banta ESD	San Joaquin	770
199. Wheatland UHSD	Yuba	739
200. Rancho Santa Fe SD	San Diego	700
201. Emery USD	Alameda	687
202. San Pasqual Valley USD	Imperial	654
203. Summerville UHSD	Tuolumne	624
204. Solvang SD	Santa Barbara	607
205. Shoreline USD	Marin	504
206. Fort Sage USD	Lassen	483
207. Calaveras COE	Calaveras	450
208. Columbia SD	Tuolumne	435
209. Eastern Sierra USD	Mono	417
210. Le Grand Union ESD	Merced	401
211. Kings River Union ESD	Tulare	476
212. Foresthill Union SD	Placer	396
213. Janesville Union SD	Lassen	386
214. Alview-Dairyland Union SD	Madera	367
215. Butte Valley USD	Siskiyou	276
216. Clay Joint ESD	Fresno	250
217. Westwood USD	Lassen	189
218. Ballard SD	Santa Barbara	143
219. McKittrick ESD	Kern	80
220. Alpine County USD	Alpine	75
POSITION: EXECUTIVE DIRECTOR/DIRECTOR		
221. Amethod Public Schools (Charter)	Alameda/Contra Costa	
222. Baldy View ROP	San Bernardino	
223. Birmingham Community Charter HS	Los Angeles	
224. Clayton Valley Charter High School	Contra Costa	
225. Coastline ROP	Orange	
226. East San Gabriel Valley SELPA	Los Angeles	
227. Oxford Preparatory Academy	Orange	
228. Ridgecrest Charter	Kern	
229. River Charter School	Sac/Yolo	
230. San Diego COE	San Diego	
231. San Ramon Valley SELPA	Contra Costa	
232. So. Orange County SELPA	Orange	
233. West End SELPA, San Bernardino COE	San Bernardino	
234. West San Gabriel Valley SELPA	Los Angeles	



BOARD COMMENDATIONS

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

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

Buena Park SD: We are so appreciative of our collaboration with Leadership Associates! They examined the needs of our community and brought forth high-quality superintendent candidates. Every phase was executed perfectly. We are very happy with our superintendent choice and recommend, without reservation, Leadership Associates. We are especially thankful for how personable Dr. David Verdugo and Sandy Sanchez were with each board member and Erin.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Oroville UHSD: It has been an absolute pleasure to work with Rich Fischer and Tom Changnon of Leadership Associates. They are highly organized, knowledgeable, accessible, personable and have numerous outstanding contacts. They took the time to get to really know our community and district so as to know candidates who would be a good fit for us.

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

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

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

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

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

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

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

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

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

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

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

A Proposal Prepared for

Monrovia Unified School District

Monrovia, California

for

*The Search and Selection of a
Superintendent of Schools*

by

MCPHERSON  **JACOBSON, LLC**

Executive Recruitment & Development



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January 9, 2024

Board of Education
Monrovia Unified School District
325 E. Huntington Drive
Monrovia, California 91016

Thank you for the opportunity to respond to your RFP. The enclosed proposal describes the professional services McPherson & Jacobson, L.L.C. will provide Monrovia Unified School District in ensuring your superintendent search secures quality leadership for the district.

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

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

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

Our contact information:

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

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

Sincerely,

Dr. Norm Ridder

Owner, McPherson & Jacobson L.L.C.

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01/24

Executive Summary

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

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

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

About McPherson & Jacobson

The McPherson & Jacobson Difference

“It’s About the Kids”

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

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

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

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

California School Boards Association Business Partner

The **California School Boards Association** has selected McPherson & Jacobson, L.L.C. as an exclusive business partner for superintendent searches in California. McPherson & Jacobson is a leading national search firm that has California-based consultants.

Leading National Search Firm

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

Nationwide Network of Experienced Consultants

McPherson & Jacobson has **over 130 consultants** across the nation. Over one-fourth of McPherson & Jacobson consultants are minorities or female. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their

diversity and expertise ensures your search results in quality leadership for education excellence.

Sustainability in Leadership

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

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

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

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

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

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

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

Applicant Diversity

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

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

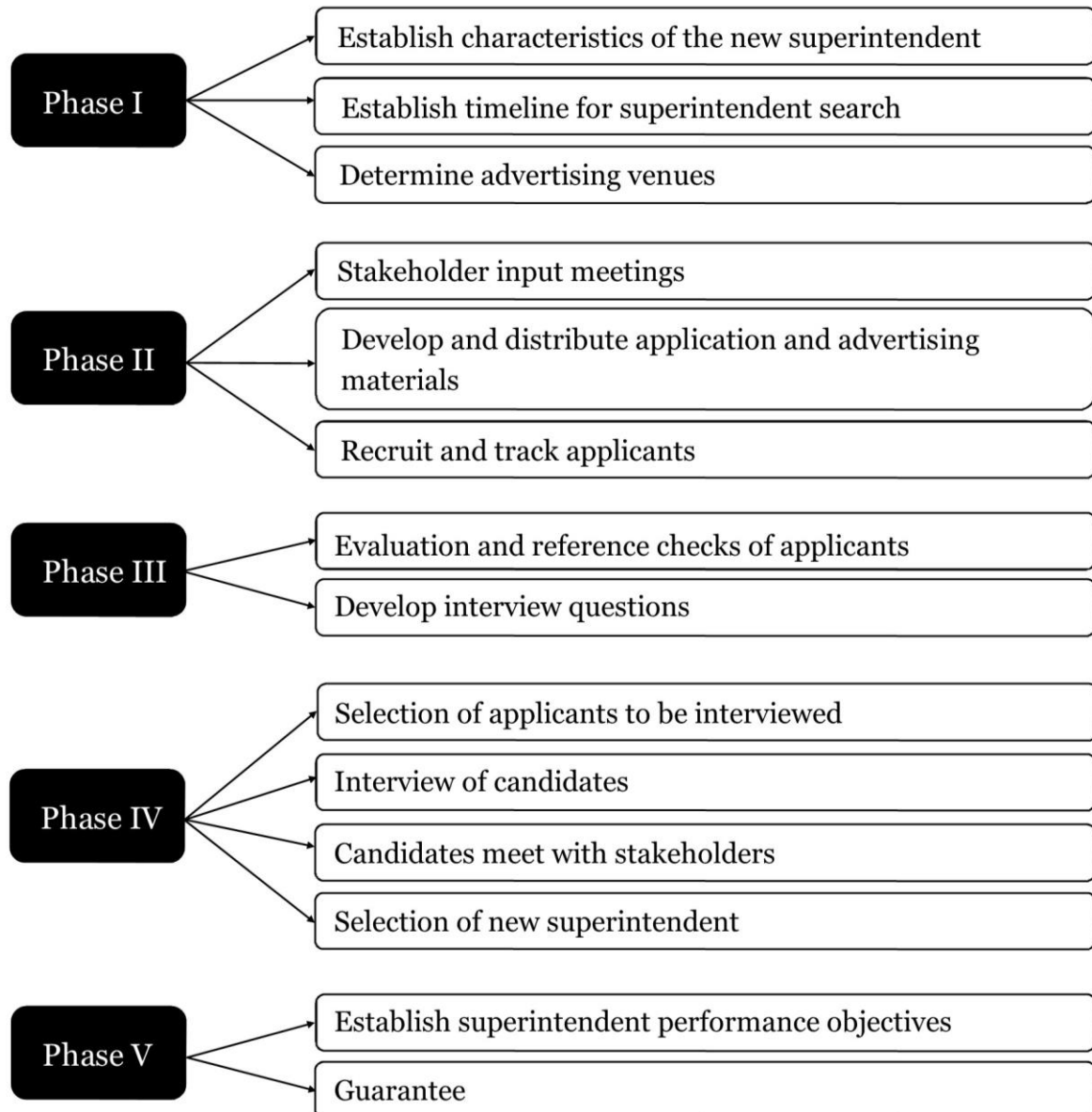
We use our consultant network to track the careers of successful administrators. We also work closely with universities, colleges, and professional organizations that represent and promote minority and female applicants.

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

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

Search Process

Five Phases of a Superintendent Search



Phase I—Initiating the Search Process

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

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

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

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

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

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

- ✓ **Identify appropriate stakeholder groups.**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

✓ **Confidentiality of Applicants**

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

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

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

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

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

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

Phase III—Applicant Screening

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

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

✓ **Conduct reference checks.**

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

of three people removed from the primary references. What we are looking for is consistency of answers that will verify the applicant's strengths and weaknesses.

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

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

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

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

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

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

Phase IV—Reviewing Candidates with the Board, Interviews

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

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

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

✓ **Conduct background checks.**

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

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

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

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

✓ **Coordinate interview and visitation procedures.**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Phase V—Transition with Success

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

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

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

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

✓ **Provide a guarantee.**

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

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

Timeline

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

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

- At the beginning of the search (**late January 2024**)
 - The qualities for the new superintendent are identified
 - A formal timeline is established
 - Advertising decisions are made
 - Application information is posted
 - A brochure is created to advertise the district and the vacancy
- At the time designated by the board (**early February 2024**)
 - Stakeholder group meetings are held
 - A summary of stakeholder input is presented to the board
- As applications arrive in our office
 - Applications are monitored and applicants are notified of the deadlines to submit their materials
- After the closing date (**mid-March 2024**)
 - 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 (**late March 2024**)
 - Consultants provide information to the board on all applicants who completed the process
 - Consultants present summary profiles and video interviews of qualified candidates to the board
 - The board selects the candidates it wants to interview
 - Criminal/financial/degree verification background checks are conducted on the candidates selected to be interviewed
 - McPherson & Jacobson notifies each applicant not selected for an interview
- Soon after the board selects their candidates (**early April 2024**)
 - 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

Consultants for Monrovia Superintendent Search

Ben Johnson II

Riverside, CA

Email: b_johnson@macnjake.com

Phone: 951-316-9615

Educational Background

B.A. University of California, Irvine, CA

Psychology

Professional Experience

Dates			Title	Company	Location
2021	to	Present	CEO	Bow Tie Consulting	
2017	to	Present	Regional Care Lead	UCB BioPharma	Smyrna, GA
2014	to	Present	Consultant	McPherson & Jacobson, L.L.C	Omaha, NE
2014	to	2017	Vice-President of Business Development	The Audit Group	
2013	to	2014	Regional Vice-President (Spend & Clinical Management)	Medassets	
2011	to	2013	Director of Healthcare West Regional Sales Manager	Workflow One	Ontario, CA
2010	to	2010	Regional Sales Manager	Pacificord Bio-Tech	Irvine, CA
1997	to	2010	District Sales Manager	Sanofi-Aventis U.S.	Bridgewater, NJ
1995	to	1997	Field Sales Trainer	Sanofi-Aventis U.S.	Bridgewater, NJ
1993	to	1995	Senior Sales/ Institutional Sales	Sanofi-Aventis U.S.	Bridgewater, NJ
1989	to	1993	Sales Representative	Sanofi-Aventis U.S.	Bridgewater, NJ

Community/Service/Fraternal Organizations

Name of Organization	Dates			Offices Held
Riverside County Board of Education	2022	to	Present	Board Member
Riverside Community College District Foundation Board of Directors	2020	to	Present	Member
California Baptist University	2020	to	Present	Dean's Community Advisory Council
Sigma Alpha Epsilon: National Board of Directors	2019	to	Present	Member
Parkview Community Hospital Advisory Committee	2012	to	Present	Member
Riverside Community Health Foundation	2007	to	Present	Board of Directors
Alvord Unified School District	1995	to	2017	President Alvord Board of Education
S. Cal Sigma Alpha Epsilon Alumni Association	1993	to	2019	Advisory Board

Ms. Suzanne Morey
Laguna Woods, California 92637
Email: s_morey@macnjake.com
Phone: 720-334-5862

Educational Background

MA	1989	Teachers College, Columbia University	Elementary Education
BFA	1984	Syracuse University	Musical Theatre

Professional Experience

Dates			Title	District	Location
2023	to	Present	Consultant	McPherson & Jacobson, L.L.C.	
2017	to	Present	Assistant Superintendent	Pueblo District 60	Pueblo, CO
2016	to	2017	Principal on Special Assignment	Denver Public Schools	Denver, CO
2011	to	2016	Principal, Denver Summit Schools Innovation Network (DSSN)	Denver Public Schools	Denver, CO
2009	to	2011	HR Executive Director of Strategic School Support	Denver Public Schools	Denver, CO
2004	to	2005	Instructor	University of Colorado	Denver, CO
1998	to	2009	Principal	Aurora Public Schools	Aurora, CO
1996	to	1998	Assistant Principal	Aurora Public Schools	Aurora, CO
1996	to	1996	Acting Assistant Principal	Aurora Public Schools	Aurora, CO
1988	to	1995	Teacher	The Cathedral School & Colorado Academy	New York, NY & Littleton, CO

Professional Organization Memberships

Name of Organization	Dates	Offices Held
Colorado Association of School Executives (CASE)	2017 to Present	Member
2Partner Mathematics Consulting Advisory Board	2023 to Present	Member

Professional Recognition/Awards

Name of Award	Awarding Organization, Committee, etc.	State
Governor's Award for Significant School Improvement	Colorado Governor	CO

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

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

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

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

Stakeholder Involvement

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

Initial stakeholder input sessions

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

Meeting the candidates

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

Process for Obtaining Staff Input

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

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

Process for Obtaining Parent and Community Input

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

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

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

Process for Including Ethnically Diverse Communities

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

Process for Obtaining Online Stakeholder Input

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

Selected References

Santa Paula Unified School District

201 S. Steckel

Santa Paula CA 93060

School Phone: 805-933-8800

School District Contact: Marisela Garcia 805-933-8802

Board Contact: Jeri Mead 805-275-9312

Search Year: 2020/21

Enrollment: 5,200

Soledad Unified School District

1261 Metz Road

Soledad CA 93960

School Phone: 831-678-3950

School District Contact: Marilyn Cline

Board Contact: Javier Galvan 831-737-6057

Search Year: 2020/21

Enrollment: 5,000

Stockton Unified School District

56 South Lincoln Street

Stockton CA 95203

School Phone: 209-933-7000

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

Board Contact: AngelAnn Flores 209-645-9644

Search Year: 2022/23

Enrollment: 33,000

Cost Proposal for Monrovia Unified School District

Investment for the Search

The fee for conducting the superintendent search is \$16,800 for Phases I-V.

Estimated Expenses \$4,550

- **Advertising**
 - Four (4) weeks of print advertising in EdCal (40-word ad)
 - Sixty (60) days of advertising on EdJoin
 - *Expenses may increase if additional advertising or alternative advertising venues are chosen.*
- **Stakeholder Meetings**
 - One (1) day of in-person stakeholder meetings
 - Online stakeholder input surveys
 - Final report delivered to the board by email and one hard copy per board member, if requested
 - *If the district requests additional stakeholder input days, there will be an additional fee (negotiated between the district and the consultants) and additional expenses.*
 - *Depending on the languages selected for the surveys, there may be an additional fee charged for translating the results of the survey.*
- **Candidate Reviews/Information**
 - Video interviews of candidates (five (5) video interviews are included in the not to exceed amount)
 - Criminal/financial/credential verification background check for candidates chosen by the board for interviews (four (4) background checks are included in the not to exceed amount)
 - Assist in scheduling an on-site visitation to the finalist's home district (at the district's request).
- **Consultant Travel**
 - Travel expenses for consultants for scheduled trips to the school district (initial meeting with the board, stakeholder meetings, meeting to discuss the stakeholder input, meeting to present candidates to the board).
 - *Consultant travel expenses can be reduced if the district requests online meetings.*
- **Office Expenses**

The total not to exceed amount including expenses is \$21,350.

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

K12 Insight Stakeholder Input (included in price)

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

Additional Services Available

- **Creating a Brochure for the Vacancy**

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

- **Personality/Strengths Assessments Option**

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

Assistance in Hiring the Selected Candidate

The fee will be based on an hourly negotiated rate.

- Assist the board in revising and updating the superintendent's job description.
- Assist the board in developing an effective contract.
- Provide assistance in negotiating the contract with the finalist.

McPherson & Jacobson Guarantees

Client Satisfaction

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

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

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

Price Match

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

Recruiting the Selected Candidate

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

Additional Information

California Consultants

Mrs. Nicole Anderson, Educational Consultant, Vallejo
Dr. Adam Clark, Superintendent, Mt. Diablo USD, Concord
Dr. Sonny Da Marto, Retired Superintendent, Folsom
Dr. Reyes Gauna, Superintendent, Byron Union School District
Dr. Shelley Jones-Holt, Educational Consultant, Sacramento
Dr. Michele Huntoon, Associate Supt. of Business, East Side Union High School District
Mr. William Huyett, Retired Superintendent, Lodi
Mr. Benjamin “Ben” Johnson II, Former Board Member, Riverside
Dr. Steven Lowder, Retired Superintendent, Stockton
Dr. Michael McCoy, Retired Superintendent, Bakersfield
Dr. Daniel Moirao, Retired Superintendent, Danville
Mr. Daniel Moore, Superintendent, Linden
Ms. Suzanne Morey, Retired Administrator, Laguna Woods
Dr. Stanley Munro, Administrator, Fresno USD, Clovis
Mr. Dennis Murray, Retired Superintendent, Cameron Park
Dr. Julie Vitale, Superintendent, Oceanside Unified School District
Mr. Daniel Zeisler, Retired Superintendent, Grass Valley

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

Albany Unified School District, Berkeley

Search Year: 2018/19, Enrollment: 3,714

Alisal Union School District, Salinas

Search Year: 2015/16, Enrollment: 9,000

Search Year: 2019/20, Enrollment: 9,000

Alpine Union School District, Alpine

Search Year: 2015/16, Enrollment: 1,700

Anderson Union High School District, Anderson

Search Year: 2018/19, Enrollment: 1,800

**Association of California School Administrators (ACSA)—Sr. Director of Diversity,
Equity and Inclusion, Sacramento**

Search Year: 2022/23

Benicia Unified School District, Benicia

Search Year: 2014/15, Enrollment: 5,000

Berkeley Unified School District—Executive Director for Special Education, Berkeley

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

Calexico Unified School District, Calexico

Search Year: 2017/18, Enrollment: 8,966

Central Unified School District, Fresno

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

Central Union High School District, El Centro

Search Year: 2021/22, Enrollment: 4,116

Cold Spring School District, Santa Barbara

Search Year: 2016/17, Enrollment: 175

Conejo Valley Unified School District, Thousand Oaks

Search Year: 2014/15, Enrollment: 19,500

Davis Joint Unified School District, Davis

Search Year: 2021/22, Enrollment: 8,300

**Davis Joint Unified School District—Associate Superintendent for Instructional
Services, Davis**

Search Year: 2022/23, Enrollment: 8,300

**Del Norte Unified School District—Executive Director of Special Education,
Crescent City**

Search Year: 2022/23, Enrollment: 3,600

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Mount Shasta Union School District, Mt. Shasta
Search Year: 2021/22, Enrollment: 534

Nevada Joint Union High School District, Grass Valley
Search Year: 2017/18, Enrollment: 2,600

New Haven Unified School District, Union City
Search Year: 2016/17, Enrollment: 12,148
Search Year: 2018/19, Enrollment: 12,000

Newark Unified School District, Newark
Search Year: 2019/20, Enrollment: 5,700

Newcastle Elementary School District, Newcastle
Search Year: 2014/15, Enrollment: 796
Search Year: 2022/23, Enrollment: 398

Oakley Union Elementary School District, Oakely
Search Year: 2020/21, Enrollment: 4,900

Old Adobe Union School District, Petaluma
Search Year: 2013/14, Enrollment: 1,700
Search Year: 2019/20, Enrollment: 1,950

Oxnard Union High School District, Oxnard
Search Year: 2015/16, Enrollment: 16,500
Search Year: 2019/20, Enrollment: 16,800

Pacifica School District, Pacifica
Search Year: 2022/23, Enrollment: 3,000

Parlier Unified School District, Parlier
Search Year: 2017/18, Enrollment: 3,435
Search Year: 2019/20, Enrollment: 3,500

Paso Robles Joint Unified School District, Paso Robles
Search Year: 2013/14, Enrollment: 6,500

Penn Valley Union Elementary School District, Penn Valley
Search Year: 2014/15, Enrollment: 700

Piner-Olivet Union School District, Santa Rosa
Search Year: 2019/20, Enrollment: 1,300

Pollock Pines Elementary School District, Pollock Pines
Search Year: 2015/16, Enrollment: 800

Rancho Santa Fe School District, Rancho Santa Fe
Search Year: 2022/23, Enrollment: 581

Red Bluff Joint Union High School District, Red Bluff
Search Year: 2013/14, Enrollment: 1,622

Richland School District, Shafter
Search Year: 2015/16, Enrollment: 3,504

Riverbank Unified School District, Riverbank
Search Year: 2022/23, Enrollment: 2,400

Roseville Joint Union High School District, Roseville

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

San Bernadino City School District, San Bernadino

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

San Carlos School District, San Carlos

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

San Mateo-Foster City School District, Foster City

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

Santa Barbara Unified School District, Santa Barbara

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

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

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

Santa Paula Unifued School District, Santa Paula

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

Santa Ynez Valley Union High School District, Santa Ynez

Search Year: 2020/21, Enrollment: 850

Saugus Union School District, Santa Clarita

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

Sausalito Marin City School District, Marin City

Search Year: 2015/16, Enrollment: 524

Search Year: 2022/23, Enrollment: 415

Sierra-Plumas Unified School District, Loyalton

Search Year: 2022/23, Enrollment: 400

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

Search Year: 2018/19, Enrollment: 386

Siskiyou Union High School District, Mt. Shasta

Search Year: 2021/22, Enrollment: 555

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

Search Year: 2022/23, Enrollment: 575

Soledad Unified School District, Soledad

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

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

Sonoma Valley Unified School District, Sonoma

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

Sonora Union High School District, Sonora

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

South Bay Union School District, Eureka

Search Year: 2021/22, Enrollment: 500

South Monterey County Joint Union High School District, King City

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

Stockton Unified School District, Stockton

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

Strathmore Union Elementary School District, Strathmore

Search Year: 2019/20, Enrollment: 773

Vallecito Union School District, Avery

Search Year: 2020/21, Enrollment: 600

Vallejo City Unified School District, Vallejo

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

Ventura Unified School District, Ventura

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

Washington Unified School District, West Sacramento

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

Whittier City School District, Whittier

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

Winship-Robbins Elementary School District, Meridian

Search Year: 2013/14, Enrollment: 200

Winters Joint Unifed School District, Winters

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

Transparency—The McPherson & Jacobson Difference

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

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

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

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

...

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

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

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

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

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

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

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

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

...

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

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

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



Matt Best
Superintendent

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

To whom it may concern:

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

Sincerely,

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

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

Bill:

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

Neil Layton
San Carlos School District
San Carlos, CA



Christi Barrett, Ph.D.
Superintendent

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

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

**Professional Development
Academy**
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Fax: (951) 765-6421

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

www.hemetusd.org



www.facebook.com/hemetunified



twitter.com/HemetUnified

August 13, 2020

To Whom It May Concern:

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

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

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

Sincerely,

Christi Barrett, Ph.D.
Superintendent

Comments from Santa Barbara Unified School District

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

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

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

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

Dr. Jacqueline Reid, Santa Barbara Unified School District, CA

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

Monday, September 19, 2022

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

Re: Letter of Reference for McPherson and Jacobsen, LLC

To Whom It May Concern,

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

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

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

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

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



Gregg Gunkel, Board President Siskiyou Union High School District



LINDEN

Unified School District

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



January 30, 2023

TO: MacPherson & Jacobson

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

To whom it may concern:

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

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

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

Sincerely,

Eric Nims

Eric Nims

Linden Unified School District

Board Vice President

ADMINISTRATION

Daniel Moore
Superintendent

Dr. Jamie Hughes
Assistant Superintendent

Stephen Corl
Chief Business Official

GOVERNING BOARD

Marla Livengood
President

Eric Nims
Vice President

Marlene Von Berg
Clerk

Jennifer Trotter
Board Member

Rebecca Hall
Board Member



SAN MATEO-FOSTER CITY
SCHOOL DISTRICT



January 29, 2023

To whom it may concern,

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

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

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

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

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

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

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

Board of Trustees

LaTisa Brooks Allison Proctor
Kenneth Chin Shara Watkins

Superintendent

Diego R. Ochoa



SAN MATEO-FOSTER CITY
SCHOOL DISTRICT



Sincerely,

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

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

Board of Trustees

LaTisa Brooks Alison Proctor
Kenneth Chin Shara Watkins

Superintendent

Diego R. Ochoa



Superintendent Search Proposal

Prepared for the

MONROVIA UNIFIED SCHOOL DISTRICT



Board of Trustees

Jennifer Anderson, President

Rob Hammond, Vice-President

Maritza Travanti, Clerk

Selene Lockerbie, Member

Traci Gholar, Member

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January 8, 2024

Jennifer Anderson, President of the Board of Trustees
Monrovia Unified School District
325 East Huntington Drive
Monrovia, CA 91016

Dear Board President Anderson and Members of the Board of Trustees,

We are pleased to be considered as the search firm that will assist you in the selection of your new superintendent. The Cosca Group (TCG) is proud to be recognized for delivering much more than the mechanics involved in a typical search. Our technique is purposefully inclusive, our strategy is comprehensive, and our consultants are personally engaged. As a result, our consultants are equipped to provide exceptionally well-informed advice and services. Our veteran partners have successfully conducted many searches over the past 23 years, providing the highest level of service to a wide range of districts.

A distinct benefit of our client-centered approach is that it substantially contributes to building confidence in the Board and its new superintendent and establishing the effective stakeholder relationships so important for successfully serving the needs of your students, parents, staff and community.

Preparation is always key to a successful search. You can rest assured that we stand ready to deliver a fully transparent and open process, complete with ample opportunities to gather input from all of your stakeholders, including families, staff and the community.

It is our pleasure to offer the services of Mr. Joel Shapiro, President, and Ms. Pat Puleo, Chief Financial Officer as your search team. We are both widely recognized for our distinguished careers, particularly our expertise in Board/superintendent relations and district governance. Moreover, with our extensive experience and recognized success working at both the elementary and the secondary levels, each of us is uniquely prepared to recognize the unique aspects of your school district. We will also have access to the resources and expertise of the entire TCG membership.

For more information, please visit www.TheCoscaGroup.com or contact Mr. Joel Shapiro at 626-497-5059. We look forward to presenting the unique aspects of our proposal to you.

Thank you for your consideration. It would be an honor to work with you.

Sincerely,



Joel Shapiro
President

WHY TCG

Simply service second to none.

CLIENT-FOCUSED

The hallmark of TCG is the personal attention our consultants devote to every detail in the process.

We understand that, because personalities and relationships are involved, there is far more to matching a district with the right superintendent than only pairing requirements with qualifications. That is why our consultants are personally invested in learning as much as possible about the expectations of each Board, district and community. Their concentrated efforts to appreciate the unique needs, expectations and culture of the Board, staff and community enables them to deliver well-informed assistance for our clients.

COMPREHENSIVE

While the typical superintendent search process incorporates one or more ways to collect Board and stakeholder input, our approach is purposefully exhaustive, with a marked emphasis on engaging the full range of district stakeholders in identifying the particular needs of the district personnel and the expectations of the community as well as assisting Boards with their efforts to keep their stakeholders fully informed and abreast of the search process as it evolves.

This inclusive outreach centered on accurately establishing an in-depth understanding has been pivotal to successfully delivering quality candidates and concurrently launching broad support for the new superintendent, the Board and the district.

Our commitment to our clients is further underscored by the fact that we do not maintain a “stable” of applicants like some firms, but instead strive to put forward candidates that are genuinely suited to the district.

INCLUSIVE

We are committed to fostering, cultivating and preserving a culture of equity, diversity and inclusion, and we reflect these values in every aspect of our service.

We embrace and encourage differences in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, and other characteristics that make each human being special.

We acknowledge and honor the fundamental value and dignity of all individuals, and we pledge ourselves to promoting an environment that respects diverse traditions, heritages, and experiences.

ABOUT TCG

TCG proudly boasts a **95% longevity of at least five years** for TCG-placed superintendents! TCG has earned a reputation for a genuine commitment to its clients as well as for its efforts to purposely form lasting, meaningful relationships with the superintendents and districts it serves.

With its proven expertise in all phases of school district leadership, TCG has the capacity to assist a governing Board in selecting a new superintendent and in developing a working relationship that will successfully serve the needs of its students, parents, staff and community.

HISTORY

The Cosca Group (TCG) was founded by Dr. Frank Cosca in 2000. Today it is comprised of 24 partners and four associate partners, all recognized for their career achievements, representing all geographical regions of California.

PHILOSOPHY

We believe that education is a cooperative effort of family, school, and community and that all children deserve the opportunity for success in schools.

We believe that every district deserves a leader that will recognize and build on the district's strengths, identify and address its areas of concern, and possess and model the personal characteristics that the district and community value.

We believe in involving district leadership in every phase, conferring with the district Board for every key decision and providing continuous communication and frequent updates, and affording convenient and reliable access to assigned lead consultants throughout the process.

QUALIFICATIONS AND EXPERIENCE

- ◆ TCG partners have successfully led geographically and culturally diverse school systems across California including small, suburban and urban school districts.
- ◆ All TCG partners and associates possess broad personal and professional networks within the state and on the national level.
- ◆ TCG partners and associates have served in leadership roles in Association of California School Administrators (President and Executive Director), California School Boards Association, American Association of School Administrators, California Association of School Business Officials and California Coalition for Adequate School Housing, California Small Schools Association, California Association of Latino Superintendents, and California Association of Bilingual Educators.
- ◆ A TCG partner was recognized by ACSA with the prestigious "Marcus Foster" award.
- ◆ Three TCG partners have been California Superintendents of the Year and nationally honored.

- ◆ A TCG partner founded the National Association of School Superintendents.
- ◆ TCG partners and associates teach or have taught graduate courses in Educational Leadership, School Finance and other specialties within the field of school district administration.
- ◆ TCG partners and associates have been honored with awards from educational, community, county and civic organizations.
- ◆ TCG partners have held leadership positions in the Western Association of Schools and Colleges and chaired visitations in California, Hawaii, Pacific Islands and Asia.

SPECIAL ATTRIBUTES

- ◆ TCG is widely recognized for its purposeful, personal attention to all phases of the search process.
- ◆ TCG customizes its process to meet the district's unique needs.
- ◆ TCG is known for delivering strong, reliable communication throughout the process.
- ◆ TCG's extensive network of partners in the state and national level offers unparalleled access to qualified candidates.
- ◆ TCG offers an online survey in English and Spanish to augment the stakeholder input collected in the extensive personal meetings.
- ◆ TCG focuses on seeking candidates that meet identified district needs; TCG does not maintain a "stable" of candidates.
- ◆ TCG's fee is competitive and all-inclusive.

RECENT SUCCESSFUL RECRUITMENTS

Temple City Unified School District

Marysville Joint Union School District

Keppel Union School District

Cotati Rohnert Park Unified School District

Rosemead School District

Los Nietos School District

Taft Union High School District

San Marino Unified School District

Mammoth Unified School District

Morongo Unified School District

PERSONNEL

Mr. Joel Shapiro is the former superintendent of the South Pasadena Unified School District. He has been involved in advancing teaching and learning on regional and state levels, serving as a regional chair of the Curriculum, Instruction and Accountability Committee and on the state council of the Association of California School Administrators; on the Board of Directors of the California Staff Development Council; and as a member of the Superintendent's Advisory Group for EdLeader 21, a national network of school districts committed to promoting 21st century learning for all students. He has conducted numerous superintendent searches for The Cosca Group, facilitated numerous governance workshops for Boards, and mentored several superintendents and other district leaders. He has been an adjunct professor at Cal. State Northridge and Occidental College.

Ms. Pat Puleo has had a comprehensive career in education. She served as Director of Education Programs, University Extended Education, at California State University, Fullerton, for six years. As part of that responsibility, she led outreach efforts, on behalf of the university, in several districts throughout Southern California in the areas of district program development, evaluation, curriculum and instruction, grant evaluation, support to underperforming schools, and administrator mentoring. Prior to her tenure at CSUF, Pat was the Director of Education Services in the Fullerton School District, principal, and coordinator of special programs. She has distinguished herself throughout her career as evidenced by her being recognized as Administer of the Year in Orange County during her tenure as principal and received the Outstanding Service to the University Award from the College of Human Development and Community Service, CSUF, in 2000. She has been working as a private consultant for ten years in district strategic planning, instruction, curriculum, evaluation, and mentoring throughout California.

TCG METHODOLOGY

COMMITMENT AND SERVICE

Our lead consultants offer well-informed guidance and support to the Board, and stakeholders, and candidates because they make it a point to be personally and continuously engaged in performing every service in the process. Attention to detail is unsurpassed.

Unlike some firms, TCG does not outsource services or delegate responsibility for them to office support staff. Support staff will be asked to provide minimal assistance, such as helping to schedule stakeholder focus group meetings.

To the contrary, TCG lead consultants collect, organize, and review relevant district data and information themselves; they review, organize and summarize stakeholder input themselves; and they develop marketing materials; and prepare reports and updates themselves.

The same is true of paper-screening and reference-checking applicants; furthermore, they incorporate the assistance of a TCG Panel of Experts drawn from TCG partners who are similarly knowledgeable and experienced.

TRANSPARENCY

TCG's standard practice is to develop an optimal communication protocol at its first meeting with the Board to assure continuous and convenient contact with the lead search consultants.

Regular updates for the Board, stakeholders, and community will be provided to the Board.

While some firms bring forward only candidates they recommend to interview, in the interest of full disclosure, TCG delivers a comprehensive report that includes the complete application package for every applicant. TCG's commitment to transparency is underscored by the fact that it does not maintain a "stable" of applicants like some firms, but instead strives to put forward candidates that are genuinely suited to the district's needs.

COMPREHENSIVE STAKEHOLDER INCLUSION

TCG's standard practice is a thorough, personally managed, three-step input collection process.

Step 1. Consultants will meet with the Board and identify the district's strengths and needs/critical issues. Based on those strengths and needs/critical issues, identify the characteristics desired in the new Superintendent. The Board will also identify groups and individuals representing community members, students, parents, teachers, classified employees, administrators, etc. to provide input to TCG, and recommend custom strategies to engage all representative communities within the district, including its non-English-proficient constituents.

Step 2. Consultants will meet with the identified groups and individuals and receive input regarding the district's strengths and needs/critical issues. Concurrently one or more online surveys and/or hard copy questionnaires will be widely publicized and made conveniently available to stakeholders to gather input regarding district needs and the desired characteristics of the new superintendent. All information will be recorded, tallied, and organized into a comprehensive report to be presented to Board.

Step 3. Consultants will meet with the Board to review and analyze stakeholder input, thereby providing an opportunity to reexamine, modify and prioritize its identified lists of district strengths, needs/critical issues, and preferred characteristics of a new superintendent. Based on the Board's findings, consultants develop an electronic brochure to be presented to the Board for final approval.

SCREENING AND BACKGROUND CHECKS

Using the Board-adopted candidate criteria to assess each candidate's capacity to meet the district's needs, the lead consultants independently or with a TCG Panel of Experts will screen and identify the most qualified applicants.

Vetting will include, but not be limited to, appraisal of materials, preliminary reference checks and verifications, internet background reviews, and review via TCG networks and contacts.

Comprehensive background checks of finalists are conducted by an experienced professional. Background checks incorporate the services of an online service that compiles reports from millions of public records and information provided by state and local governments. Reports include an address history, related persons, arrest records, bankruptcy records, government license information, social media profiles, and sex offender records.

CONFIDENTIALITY

While TCG standard practice is to conduct an open and transparent search process, maintaining applicant confidentiality is central to attracting top candidates; as a result, the names of all applicants are kept confidential until the Board publicly announces a finalist for the position. The procedure may be adapted to accommodate unique Board needs and preferences.

STAKEHOLDER COMMUNICATION

TCG's will collaborate with the Board and the district staff to identify the stakeholder groups and individuals to provide input during the pre-recruitment phase. In addition, TCG will conduct community forum meetings and provide a survey to receive stakeholder input. .

DISTRICT CONTACT(S)

TCG's standard practice is to contact the Board President for information related to the search process and a district-assigned staff member for scheduling, logistics, and basic operational assistance.

SEARCH SCOPE

While many districts prefer candidates with California backgrounds because they are grounded in the state's unique policies and culture, in some cases Boards prefer to reach out across the country to seek a fresh approach or a unique talent, or to cast a wider net.

TCG's standard practice is to base a search scope on the district's unique needs, challenges and preferences.

INTERVIEW QUESTIONS

TCG's standard practice is to develop questions in collaboration with the Board; however, the Board determines the final selection.

TCG will present the Board with a list of alternatives, including questions carefully selected for the purpose of revealing the applicants' background, experience, style, and personal traits relevant to the district and Board's needs and preferences.

WRITING SAMPLE

TCG's standard practice is to propose the writing sample as an option for the Board. If included, TCG will include recommendations for Board consideration at the same time the Board determines which questions will be included in candidate interviews.

GUARANTEES

- ◆ TCG guarantees comprehensive disclosure of all applicants.
- ◆ TCG guarantees the superintendent selection for two years; if the new superintendent leaves within two years for any reason, a second search conducted for expenses only.
- ◆ TCG guarantees the placement will not be recruited for other TCG positions at any time
- ◆ TCG guarantees its commitment to the district until a suitable candidate is appointed.

THE TCG 5 PHASE PROCESS

(TO BE CUSTOMIZED FOR THE DISTRICT)

TIMELINE

TCG suggests the following time commitments for each phase:

PHASE I: PRE-RECRUITMENT	January 29 – February 23, 2024
PHASE II: RECRUITMENT	February 26 – March 29, 2024
PHASE III: CANDIDATE SELECTION AND INTERVIEWS	March 30 – April 14, 2024
PHASE IV: APPOINTMENT OF SUPERINTENDENT	April 15 – May 8, 2024
PHASE V: SUPPORT SERVICES	Two Years

PHASE I PRE-RECRUITMENT

TCG Meets with the Board

- ◆ Customize the process
- ◆ Determine the timeline
- ◆ Establish the district's strengths and needs/critical issues and identify the characteristics desired in the new superintendent
- ◆ Establish the Board's preferences and expectations for its working relationship with the new superintendent
- ◆ Identify the full range of district stakeholders, including students, parents, teachers, classified employees, administrators, key individuals, and community members, non-English speakers and various other individuals and groups
- ◆ Determine the most effective strategies for engaging the stakeholders in determining the district's needs and the community's expectations of the new superintendent

TCG Collects Stakeholder Input

- ◆ Organize and personally attend individual and group meetings
- ◆ Arrange convenient input alternatives, such as online surveys
- ◆ Compile all input into a full report for the Board.

TCG Meets with the Board

- ◆ Review the Stakeholder Input Report together
- ◆ Confirm the district's strengths and needs and the characteristics desired in a new superintendent

TCG Develops and Implements the Recruitment Plan

- ◆ Develop marketing brochure for Board approval
- ◆ Arrange advertisements, including but not limited to EdCAL and Ed-Join
- ◆ Prepare announcement distribution
- ◆ Contact the 23 TCG partners for recommendations and referrals
- ◆ Arrange email announcement to the 1000+ California superintendents

PHASE II RECRUITMENT

TCG Organizes and Maintains Search Records**TCG Handles All Applicant Communication****TCG Screens All Applicant Submissions****TCG Provides Periodic Status Reports****TCG Prepares and Delivers Copies of All Candidate Applications for Board Member Review****TCG Conducts Extensive Background and Reference Checks****TCG Organizes a Panel of Experts to Identify Most Qualified Applicants****TCG Develops a Comprehensive Candidate Report for the Board**

- ◆ Lists all applicants, summarizes backgrounds and qualifications
- ◆ Provides reference check findings
- ◆ Recommends finalists for interviews

TCG Provides Prepares a Superintendent Compensation Study

PHASE III INTERVIEWS

TCG Meets with the Board

- ◆ TCG reviews Candidate Report with the Board
- ◆ Board selects candidates to interview
- ◆ TCG facilitates and assists Board selection of interview questions

TCG Schedules Interviews

- ◆ TCG arranges and facilitates interviews of all candidates selected by the Board
- ◆ TCG arranges and facilitates final interview(s) as determined by the Board

PHASE IV APPOINTMENT OF NEW SUPERINTENDENT

TCG Facilitates Culmination and Final Board Approval

- ◆ TCG assists selection and confirmation of finalist
- ◆ TCG arranges Board visit to finalist's district
- ◆ TCG assists negotiation of key sections of the new superintendent's employment contract
- ◆ TCG reviews complete Stakeholder Input Report, including the summary and all detail, with new superintendent
- ◆ TCG assists Board announcement of the new district superintendent (optional)

PHASE V SUPPORT

TCG Support Services

Included in Fee

- ◆ Mentor and support new superintendent for up to two years
- ◆ Conduct a Leadership Alignment/Governance Workshop with all Board members and new superintendent centered on initiating the new relationship by reviewing governance standards and procedures and establishing policies and expectations that are clearly understood by all.

FOCUS ON THE BOARD/SUPERINTENDENT RELATIONSHIP

Because TCG understands that the degree to which Board members and the superintendent effectively function as a team is pivotal to the future of a school district, our search process incorporates opportunities to weigh the potential for developing a successful and productive working relationship with each candidate.

- ◆ The TCG search process includes an opportunity for the Board to collectively establish their preferences and expectations for the new superintendent.
- ◆ The TCG search process provides an opportunity for applicants to describe their leadership styles and anticipated approach to the superintendent/Board working relationship in a writing sample, a questionnaire, and/or the interview.
- ◆ The TCG search process offers an opportunity for the Board to compare the responses of the applicants provided in Phase II with the preferences and expectations established in Phase I.
- ◆ The TCG search process includes a Leadership Alignment Workshop for the Board and superintendent that is centered on initiating the new relationship with mutually developed, defined and understood policies and expectations.

TESTIMONIALS

"Their process and team leaders have a unique ability to balance driving the process and providing valuable input with listening and engaging the Board . . . "

Board of Education
San Bernardino City Unified School District

". . . We found our association with The Cosca Group to be a very successful experience."

R. Elizabeth Jaka, Board President
Vista Unified School District

"They demonstrated their extensive experience in superintendent searches along with their strong commitment to perform the work outlined in the proposal . . . "

Frank A. Tarantino, Board President
Sweetwater Union High School District

"Our Board, District and community are thrilled with their professional work. We commend The Cosca Group for the high degree of professionalism and organizational skills demonstrated throughout this process."

Jannie Dutton, Board President
Keppel Union School District

"Very professional behavior with our stakeholders in gathering information about district strengths, challenges, and what they wanted to see in the new superintendent."

Peggy Foster, Board President

Eastside Union School District

"The Woodland Joint Unified School District has used The Cosca Group in two occasions and in both instances they have delivered a highly qualified Superintendent."

Samuel Blanco III, Board President
Woodland Joint Unified School District

"Our district and community have nothing but the utmost respect and praise for the work they did for us."

Lucy Rangel, Board President
Fillmore Unified School District

"The Cosca Group was very professional throughout the entire process. From the onset, the process was thorough, professional, and extremely efficient. The process entailed time to get to know our "District, our staff, and our community, so that we could find a leader that would fit our particular needs."

D. Don Revelo, Board President
Millbrae School District

"They promised a 'winner' and they delivered."

Brian Clapper, Board President
National School District

"As president of the EUSD school Board, and on behalf of the entire Board, I highly recommend the services of The Cosca Group as your educational executive search firm."

Martin J. Hranek, Trustee
Escondido Union School District

"They are passionate about education and the importance of getting the right superintendent/district match for the sake of students and staff."

Elisabeth C. Eilers, Board President
South Pasadena Unified School District

"The attention to detail and understanding of our community were tremendous . . . I, on behalf of the Vista Unified School District Board of Trustees, offer our highest recommendation to the company."

Rich Alderson, Board President
Vista Unified School District

"The Board of Education for the Mammoth Unified School District thanks Mr. Shapiro and Dr. Britz for their selfless, professional, and excellent service in guiding us through the selection and hiring process of our new superintendent. The end result of their process was outstanding."

John Stavio
President of the Board of Education
Mammoth Unified School District

"The Cosca Group and its two consultants who have led this search realize their task goes far beyond the duties of headhunters. Public education, the foundation of American values, relies on the participation of all community members. Cosca Group asserts its belief system just below its letterhead: 'We believe that education is a cooperative effort of family, school, and community and that all children deserve the opportunity for success in schools'."

By: Lanny Lowery, Staff
The Community Voice Newspaper
Rohnert Park-Cotati-Penngrove

REFERENCES

Melissa Espinosa, Board Member
Temple City Unified School District
9700 Las Tunas Drive
Temple City, CA 91780
(626) 548-5000

Emilio Sosa, Board President
Los Nietos School District
8324 Westman Avenue
Whittier, CA 90606
(562) 692-0271

Jannie Dutton, Board Member
Keppel Unified School District
34004 128th Street East
Pearblossom, CA 93553
(661) 547-0160

Tom Painter, Former Board Member
Mammoth Unified School Dist.
462 Sierra Park Road
Mammoth, CA 93546
(760) 934-5674

Nancy Armenta, Board Member
Rosemead Unified School District
3907 Rosemead Blvd.
Rosemead, CA 91770
(626) 632-1398

Paul Linder, Board Member
Taft Union High School District
701 Wildcat Way
Taft, CA. 93258
(661) 319-5804

Robert Hamilton, Board President
Morongo Unified School District
P.O. Box 1209
Twentynine Palms, CA. 9227
(760) 367-9191

More are available upon request as indicated in the extensive list of testimonials provided above.

COST ANALYSIS

A total fee of \$21,500 is based on a search design specific to the Monrovia Unified School District inclusive of the services and expenditures described in this search proposal., Said fee includes, but not limited to:

- ◆ Providing Board support and guidance throughout the process
- ◆ Attending or participating in related meetings with the Board
- ◆ Conducting all community input sessions
- ◆ Providing an online survey for stakeholder input
- ◆ Preparing a written report detailing and summarizing all stakeholder input sessions
- ◆ Developing an electronic marketing brochure
- ◆ All state and national advertising expenses and all consultant travel expenses
- ◆ Fielding inquiries from potential and active candidates
- ◆ All application processing, assessing and paper-screening
- ◆ Preparing a written report detailing and summarizing all applicants for the position
- ◆ Preparing a list of candidates recommended for Board interviews
- ◆ Drafting interview questions for the Board
- ◆ Informing all applicants of their status throughout the process
- ◆ Conducting preliminary reference and background research of all viable candidates
- ◆ Conducting in-depth background checks of finalist(s)
- ◆ Scheduling and facilitating all interviews
- ◆ All candidate formal notifications
- ◆ Facilitating finalist site visit
- ◆ All proposal guarantees, including a second search, if needed, conducted for expenses only
- ◆ Providing two years of mentoring for the new superintendent
- ◆ Facilitating a leadership Alignment/Governance Workshop for the Board and new superintendent
- ◆ All clerical expenses and printing
- ◆ Conducting a search for expenses only if the superintendent leaves within two years

SAMPLE AGREEMENT

The Monrovia Unified School District and The Cosca Group

THIS AGREEMENT made and entered into this day of , by the Monrovia Unified School District, a political subdivision of the State of California (hereinafter "DISTRICT") and The Cosca Group, (hereinafter, "CONSULTANT").

I.

The DISTRICT desires to retain a CONSULTANT to perform special services for the search and recruitment of the superintendent.

II.

CONSULTANT is specially trained, experienced and competent to perform such special services and render such advice.

III.

1. CONSULTANT, upon notice to proceed from the DISTRICT, shall provide to the DISTRICT such special services and advice, more particularly as set forth in the Proposal presented to the DISTRICT on August 3, 2023, which is incorporated by reference herein.

2. In consideration of the foregoing, DISTRICT shall pay CONSULTANT A FEE NOT TO EXCEED \$21,500. CONSULTANT shall invoice DISTRICT in three installments as follows:

- (1) \$7,167.00 at the time of the development and presentation of the profile.
- (2) \$7,167.00 at the presentation of a slate of final candidates.
- (3) \$7,166.00 at the appointment of the new superintendent.

In addition, if the DISTRICT chooses an upgraded brochure the CONSULTANT will bill the DISTRICT for the actual and necessary expenses of said brochure, to be invoiced separately.

Terms of payment shall be net 45 days.

3. CONSULTANT shall well and faithfully perform each and all of the obligations set forth in the Agreement. CONSULTANT shall at all times be deemed an independent contractor, and neither the CONSULTANT nor any of its employees shall be considered employees of the DISTRICT for any purpose.

4. At all times, CONSULTANT shall work in cooperation with, and pursuant to the direction of the Superintendent of the DISTRICT, or the Superintendent's designee.

5. The DISTRICT shall have the right to terminate this Agreement at any time upon fifteen (15) calendar days' prior written notice. Should the Agreement be terminated, the DISTRICT shall be responsible for payment related to all services provided by the CONSULTANT up to the point of termination.

WHEREFORE, the parties have executed this Agreement on the date first above written:

FOR: Monrovia Unified School District

Date: _____

By: _____
Signature
Board President

FOR: The Cosca Group

Date: _____

By: _____
Signature
Joel Shapiro, Partner and President

2290 La Mer Court
Costa Mesa, CA 92627
Phone: 714-318-1826

Federal I.D. Number: 33-0972414

PARTIAL CLIENT LIST

Baldy View Regional Occupational Program	Bonita Unified School District
Brawley Union High School District District	Chino Valley Unified School
Cotati-Rohnert Park Unified School District District	Culver City Unified School
Delhi Unified School District District	Desert Sands Unified School
El Rancho Unified School District	Eastside School District
El Segundo City Police Department District	Escondido Union School
Fillmore Unified School District District	Hayward Unified School
Hermosa Beach Unified School District District	Huntington Beach City School
Keppel Union School District District	King City Unified School
Laguna Beach Unified School District School District	Livermore Valley Joint Unified
Lytle Creek Development Partners	Madera Unified School District
Mammoth School District District	Monrovia Unified School
Moreno Valley Unified School District District	Morgan Hill Unified School
Mountain View-Whisman School District	National City School District
Novato Unified School District	Oceanview School District
Orange Unified School District Unified School District	Palos Verdes Peninsula
Palisades Charter High School District	Paradise Unified School
Redondo Beach Unified School District	Rialto Unified School District

Rosemead School District District	Saint Helena Unified School
San Bernardino Unified School District District	San Gabriel Unified School
San Lorenzo Unified School District District	Santa Ana Unified School
Santee School District District	Silver Valley Unified School
South Pasadena Unified School District School District	Sweetwater Union High
Sulphur Springs School District District	Tahoe Truckee Unified School
Tamalpais Union High School District California	University of Southern
Vista Unified School District District	Washington Unified School
Washington Union School District	Waugh School District
Windsor Unified School District	Wiseburn School District
Woodland Joint Unified School District District	Yosemite Unified School
Millbrae School District	Marysville Joint Unified School District
Los Nietos School District	Temple City Unified School District
San Marino Unified School District	