### LEBANON COMMUNITY SCHOOL DISTRICT SCHOOL BOARD MEETING October 25, 2018, 6:00 PM

Santiam Travel Station

750 S. Third Street, Lebanon, OR 97355

### **MEETING AGENDA**

### 1. WELCOME

- A. Call to Order
- B. Flag Salute

### 2. CONSENT AGENDA

Hiring Action: Approval Requested

Name	Position	FTE	Start Date
Jessica VandenBos	Special Education Teacher	1.0	09/19/2018
William Lewis III	Director of Business	1.0	10/05/2018

### 3. SUPERINTENDENT SEARCH CONSULTANTS Action: Discussion/Decision

### 4. AUDIENCE COMMENTS

This is a time for citizens to address the Board. The Chair will recognize speaker(s) at the designated time. All speakers shall identify themselves and state their name before speaking. Speakers are asked to provide their name, address and telephone number on the Speaker's Sign-in Sheet. Each speaker may address the Board for three minutes.

### 5. ADJOURNMENT

The Lebanon Community School District Board of Directors welcomes you to our regular meeting. It is the Board's goal to hold an effective and efficient meeting to conduct the business of the District. In keeping with this goal, the Board provides a place for Audience Comments on each of its regular agendas. This is a time when you can provide statements or ask questions. The Board allows three minutes for each speaker. The language below discusses the Public Meetings Law and public participation in such meetings.

"The Public Meetings Law is a public attendance law, not a public participation law. Under the Public Meetings Law, governing body meetings are open to the public except as otherwise provided by law. ORS 192.630 The right of public attendance guaranteed by the Public Meetings Law does not include the right to participate by public testimony or comment.

"Other statutes, rules, charters, ordinances, and bylaws outside the Public Meetings Law may require governing bodies to hear public testimony or comment on certain matters. But in the absence of such a requirement, a governing body may conduct a meeting without any public participation. Governing bodies voluntarily may allow limited public participation at their meetings."

Oregon Attorney General's Administrative Law Manual and Uniform and Model Rules of Procedure under the Administrative Procedures Act. Hardy Myers, Attorney General, March 27, 2000.



A Proposal for a Superintendent Search



### INTRODUCTION

Hazard, Young, Attea and Associates, (HYA) Proposes to conduct a national search for talented and highly qualified candidates for the position of Superintendent of Schools for Lebanon Community Schools.

This document serves to clearly outline the specific services, deliverables and costs proposed for Lebanon.

### **SCOPE OF SERVICES**

Full descriptions of each phase in our search process are available in our *HYA Signature* Search Process brochure. HYA shall provide the following services and deliverables.



### **Engage Phase**

- Conduct a Planning Meeting with the Board and provide a summary of said meeting which will detail the timeline and steps of the search process and decisions made by the board;
- Survey community constituents electronically and provide a report of findings;
- Provide for up to four individual consultant days for interviews, focus groups, and/or town hall meetings to gather in-person input from constituent groups as decided by the board; additional days are billed at \$1000/day;
- Present a Leadership Profile Report to the Board, and propose Desired Characteristics based on the data from the survey, interviews with district and community representatives and other material made available to the associates;



### **Recruit Phase**

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



### **Select Phase**

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



### **Transition Phase**

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

### **FEES**

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

- A. Consulting Fee for the search in the amount of \$22,500. This fee is due in three installments:
  - 50% will be invoiced upon execution of the contract/agreement
  - 25% will be invoiced upon presentation of the Leadership Profile Report
  - 25% will be invoiced upon presentation of the slate
- B. Associate Expenses for travel will be reimbursed by the Board. Mileage reimbursement is based on current IRS guidelines.
- C. If the Board chooses to reimburse candidates for travel for interviews, HYA will coordinate the reimbursement.

- D. Based on past experience, HYA has designed advertising packages to maximize exposure for the vacancy. The Board will choose the package that best suits their needs. The cost ranges from \$1950 \$5000. See Appendix A in the HYA Signature Search Process for additional details.
- E. Background checks/Executive Due Diligence Services as selected by the Board. The cost ranges from \$1100 \$1950 per candidate. See Appendix B of the *HYA Signature Search Process* brochure for investigative procedures and options.
- F. Printing and Postage; HYA is a green corporation whereby all documents related to the search will be provided via a Board portal. If the Board wishes to have hard copies, 3% of the Consulting Fee will be added to the agreement as an additional fee to cover the costs associated with printing, binding and shipping all materials.
- G. The Community and Leadership Profile Survey is offered in English and Spanish. If the district wishes to offer the survey in additional languages, the fee is \$315 per language. Please allow up to two weeks for translation. Custom requests will be quoted based on scope of customization.

### **Optional Transition Services**

The Transition Phase consists of assisting the Board and new Superintendent to assure a successful transition. HYA associates will meet with the new Superintendent and Board leadership regarding the information learned throughout the search process. HYA offers additional Transition Services, please see appendix C of HYA Signature Search Process brochure for a full description of transition services.

- \$3000 Board Governance Workshop
- \$5000 Board Goal Setting and Superintendent Evaluation
- \$15,000 Comprehensive First Year Support (includes Governance Workshop and Board Goal Setting and Superintendent Evaluation)
- Executive Coaching (quoted based on desired frequency)

Other transition services, such as Strategic Planning, are quoted based on student population:

- Strategic Planning
- Board Governance Dashboard
- Program Evaluation

### THE SEARCH TEAM

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

**Hank Harris**, Senior Associate, will serve as your Search Consultant. Hank can be reached at 202.735.6665 and *hankharris@hyasearch.com*.

Executive oversight for the search is provided by the HYA president, Dr. Max McGee (224-234-6129, maxmcgee@hyasearch.com.

Therese Meyer, serves as project manager and can be reached at 847-744-5640 and theresemeyer@hyasearch.com.

### **GUARANTEES**

### **Fixed Price**

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

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

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

### **Client-Satisfaction**

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

### **Price Match**

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

### **REFERENCES**

HYA's reputation for effectiveness and integrity is extremely important. All of the Districts listed below have worked with our Senior Associate Hank Harris. The reference contact information includes the Board President of the District. In addition to the references listed below, an extensive list of national searches our firm has completed since 2013 is attached.

District Name		Contact
and State	<b>Board President</b>	Information
Beaverton School District	Anne Bryan	503-679-5040
Portland Public Schools	Rita Moore	971-222-4805
Richland (WA) School District	Rick Jansons	509.528.3488
Linn-Benton-Lincoln ESD	Heather Search	541-258-5261

HYA looks forward to the possibility of working with the Board and assisting with the selection of a new leader. Please contact HYA at 847-724-8465 or at hya@hyasearch.com with questions or requests for additional information.
<b>Hazard, Young, Attea &amp; Associates</b> 1475 E. Woodfield Rd, 14 <sup>th</sup> Floor

Schaumburg, IL 60173 (847) 724-8465

www.hyasearch.com



September 28, 2018

Tom Oliver, Board Chairman Lebanon Community Schools 485 South 5th Street Lebanon, OR 97355

Dear Members of the Lebanon Community Schools' Board of Education:

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

**NATIONAL REACH – LOCAL KNOWLEDGE:** We have conducted over 1200 searches across the United States and are represented by associates in every region of the nation. Our Lead Consultant, Hank Harris, has provided consulting services to more than twenty-five Oregon and Washington school districts.

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

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

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

Our technical proposal, which follows, was written and coded based on the requirements defined in your RFP. Additionally, the brochure entitled, HYA Signature Search Process, defines a prototypical search, but please know that HYA customizes each search to the District's and Board's specific needs and wishes.

Sincerely,

Glenn "Max" McGee, PhD

President

Hazard, Young, Attea & Associates

Alenn "Max" M'Su



# **HYA Signature Search Process**



HYA Signature Search Process

# The HYA Difference

### National Reach - Local Focus

Established in 1987, Hazard, Young, Attea & Associates (HYA) is one of the oldest and largest search firms having assisted more than 1000 school boards select exceptionally talented leadership in school systems across the nation, large and small, urban and rural. HYA's reputation and experience make it one of the preeminent school search firms in the nation and a standard which others often emulate. HYA Associates are located across the country to conveniently serve clients and are thus uniquely qualified to bring local - as well as national - perspectives, knowledge, experience, and connections to each search.

### The Board Portal

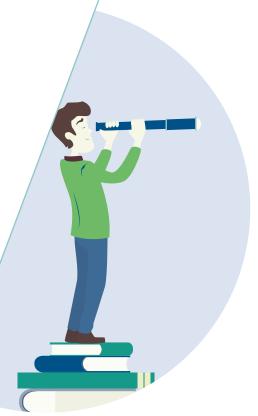
Communication and organization are critical to successful searches. Our web-based delivery system gives the Board anytime, anywhere access to all documents regarding the search. Whether through a tablet, smart phone, laptop or desktop computer, the Board and the search Associates have confidential access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

### **Executive Oversight**

Every HYA search has executive oversight by a Regional President, and HYA's Director of Operations serves as project manager to ensure all details are carefully managed. HYA has professionally staffed offices, a technological infrastructure, and a staff of full-time employees. Our tech team serves as a resource to school districts for linking the online community survey and other search materials to their website. These resources make HYA capable of responding to Board's requests in a very timely fashion.

### Research Based

HYA is the leadership division of ECRA group, a premier research and analytics firm with over 35 years of experience supporting school districts in improving student outcomes. HYA's community engagement process and online survey employ research-based approaches to identifying the goals, needs, and priorities of the school system along with the desired characteristics of its next leader. The survey was developed based on research on effective leadership. The resulting Community and Leadership Profile Survey Report provides information on the current state of the District, essential information the Board will use in the selection process and the new leader can use day one of employment. Furthermore, by blending consulting, professional service, and technology, HYA/ECRA group offers transition services and an analytics infrastructure to help the Board and their new leader better understand the interrelationships among school functions, and the impact of decisions and expenditures on student outcomes.

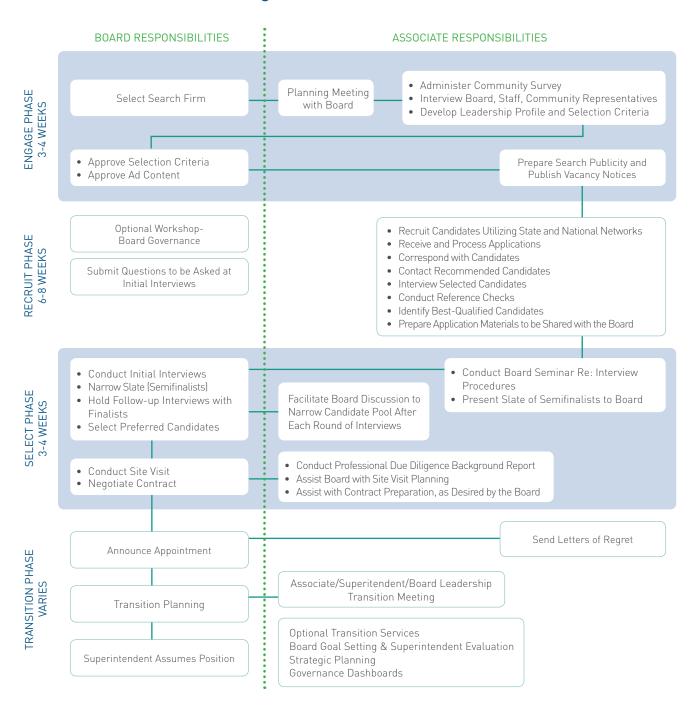


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### More Than a Background Check – Executive Due Diligence

HYA's comprehensive and expanded background checks are completed by independent third-party investigators and include an executive summary allowing for an analysis of findings, not simply dozens of articles and documents for Board members to read. The investigative procedures are comprehensive and thorough with a focus on the public school landscape - well beyond what constituents could produce through a simple internet search. This includes on-site research of primary source documents at relevant county court houses for civil and criminal record history. Additionally news and social media investigations provide a better understanding of a candidate's leadership style, public relations skills, and reputation.

### **HYA Signature Search Process**



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# The Four Phases of HYA's Signature Search

The process outlined represents a prototypical search. Upon selection, the Associates will meet with the Board to discuss this process and modify it to meet the Board's unique needs. The following is a description of each phase in the search:



The Engage phase consists of designing and planning a process of engaging the Board and stakeholders through interviews, online surveys (available in world languages), and focus groups. Information from these interactions assists the Board in developing a leadership profile and selection criteria that match the priorities of the community and that meet the unique needs of the local district. This disciplined, inclusive and research-based approach ensures all stakeholders have the opportunity to be a part of the search process and provides valuable feedback about the school district based on HYA's local research and professional understanding of the district's standing in the broader marketplace. In an effort to be fully transparent to the community, an internet link is provided to the HYA website which details the search process and the vacancy announcement.





The Recruit phase consists of leveraging HYA's extensive national network of Associates across multiple offices and incorporating advertising strategies (as selected and paid for by the Board pursuant to Appendix A) that results in the identification and recruitment of exceptionally talented leaders. HYA can also recruit non-traditional candidates, i.e. executives that have worked in business, military, private or public sector. HYA works in close partnership with state and national organizations with numerous Associates serving on those Boards.



The Select phase consists of providing the Board with a slate of candidates that were interviewed by HYA Associates using the Leadership Profile established by the Board. HYA Associates are committed to spending the necessary time and energy on the details to find the right candidates to bring to the Board. The search team then facilitates the Board interviews and appointment process including reviewing candidates' references. HYA's ability to gain important background information regarding candidates - beyond what appears on an individual's resume - is a unique and distinguishing characteristic of HYA, and is attributable to the integrity of the firm, Associates, and the vast networks of professional relationships built through years in the education field. A workshop on interviewing and construction of interview questions is facilitated by the Associates for the Board. Executive due diligence including formal background and media checks complete the Select phase (as selected and paid for by the Board pursuant to Appendix B).



The Transition phase consists of assisting the Board and new Superintendent to assure a successful transition. Appointing a new leader is the first step toward accomplishing organizational and student goals for success. Included in the search fee is a transition meeting with the new Superintendent and representative(s) of the Board regarding the information learned throughout the search process, in particular, the Community and Leadership Profile Survey. Additional transition services are available (as selected and paid for by the Board pursuant to Appendix C).

### HYA Signature Search Process

## The Search Team

Presently, HYA is represented by Associates across the United States who assist with the firm's mission to provide proactive, thorough and quality assistance to School Boards in need of identifying and recruiting highly qualified executives for superintendencies and other administrative positions. HYA Associates bring extensive executive search experience and broad educational backgrounds to its practice. Through continuing involvement in school and university work, HYA Associates are aware of current educational issues and have strong relationships with educational leaders and opinion-makers in administrative leadership and management. HYA is committed to engaging a diverse and gender balanced cadre of Associates. Among HYA Associates are members of NABSE (National Alliance of Black School Educations) and ALAS (Association of Latino Administrators and Supervisors).

HYA assigns an individual management team to each executive search that it conducts. Associates assume direct responsibility for the search and coordinate the activities of all individuals engaged in the project. In addition to the Associates assigned to the search, all nation-wide Associates in the firm are tasked with identifying prospective candidates. Board members will receive the business, home and cell phone numbers, as well as the email addresses of the Associates.

HYA has professionally staffed offices, a technological infrastructure and a full-time employed staff; thus, HYA is capable to respond to any request the Board may have on the Board's time schedule. Finally, each search has executive oversight by a Regional President and HYA's Director of Operations serves as project manager to ensure no detail is overlooked. HYA's office staff, which is highly knowledgeable and pleased to assist at any time, is available to the Board from 9:00 a.m. to 5:00 p.m. CST, Monday through Friday.

HYA believes that communication and organization are critical to successful searches. Our delivery system gives the Board anytime, anywhere access to all documents regarding the search. HYA has a adopted a green process whereby all materials are delivered via a dedicated search portal so the Board and its Associates can have confidential access to all information associated with the search in an organized and timely manner.

All materials are delivered via a dedicated search portal giving the Board immediate and organized access to all information

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# **Appendices**

- А
- Advertising Services Executive Due Diligence В
- Transition Services

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# **Advertising Services**

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

### Package 1

HYA group print ad in Ed Week

Online listing on EdWeek's TopSchoolJobs site for 30 days

Online Showcased ad on EdWeek and TopSchoolJobs homepages for 7 days

Online listing on AASA's site for 30 days

Posted on ECRA, Twitter, and LinkedIn

### Package 2

Two HYA group print ads in Ed Week

Online listing on EdWeek's TopSchoolJobs site for 30 days

Online Showcased ad on EdWeek and TopSchoolJobs homepages for 7 days

Online listing on AASA's site for 30 days

Online Spotlight and Preferred upgrades on AASA's Site for 30 days

Posted on ECRA, Twitter, and LinkedIn

### Package 3

Monthly HYA group print ad in Ed Week for length of search

Dedicated District specific print ad in Ed Week

Online listing on EdWeek's TopSchoolJobs site for 30 days

Online Showcased ad on EdWeek and TopSchoolJobs homepages for 7 days

Online listing on AASA's site for 30 days

Online Spotlight, Preferred, and Featured upgrades on AASA's Site for 30 days

Posted on ECRA, Twitter, and LinkedIn



### Options to Complement the Advertising Packages

(Choose as many as desired.)

### Careerbuilder Network

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

### ALAS & NABSE

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

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

### LinkedIn

LinkedIn listing for 30 days

### Regional Packages

(Choose one of the following.)

### California

2 advertisements (5X4) in EdCal/ ACSA (Association of CA School Administrators), print and e-publication

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

Posted on ECRA, Twitter, and LinkedIn

### Northeast

NJASA (New Jersey Association of School Administrators)

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

CAPSS (Connecticut Association of Public School Superintendents)

Posted on ECRA, Twitter, and LinkedIn

### State Specific

Three state association advertisements as decided by the associate and the board

Posted on ECRA, Twitter, and LinkedIn

HYA Signature Search Process

# **Executive Due Diligence**

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

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

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

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

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# **Transition Services**

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

### Board Governance Workshop

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

### **Board Goal Setting & Superintendent Evaluation**

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

### Comprehensive First Year Support

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

### Strategic Planning

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

### Governance Dashboards

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

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HYA looks forward to the possibility of working with the Board and assisting with the selection of a new leader. Please contact HYA at 847-318-0072 or at hya@hyasearch.com with questions or requests for additional information.

Hazard, Young, Attea & Associates

1475 E. Woodfield Rd., 14th Floor Schaumburg, IL 60173 (847) 318-0072

East Coast Regional office Jersey City, NJ

West Coast Regional office

Palo Alto, CA

www.hyasearch.com

### HANK HARRIS

1341 Q Street NW, Unit A Washington, DC, 20009

hank@humancapitalenterprises.com

### **HUMAN CAPITAL ENTERPRISES**

### Founder and President.

Mobile: 202.735.6665

11/2011 - present

Serve as a human capital consultant to school districts across the United States. Coach Superintendents, Human Resources leaders, and educational stakeholders on human capital concerns.

- Serve as a strategic planning consultant within the Human Capital arena.
- Assist K-12 school districts to improve productivity by auditing and informing HR practice.
- Serve as a nationwide public speaker/spokesperson on the topics connected to PK-12 Human Capital.
- Serve as executive search consultant and an associate for HYA (Hazard Young Attea) serving districts as diverse as Prince George's County, Maryland; Portland, Oregon; and Richmond, Virginia.
- Serve as compensation consultant to the CEO and senior leadership for multiple school districts.
- Serve as a mentor to new human resources leaders.
- Serve as interim Human Resources Director on an ad-hoc basis.
- Serve as a labor relations consultant to a Superintendent and senior leadership team.
- Serve as a thought leader on K-12 Human Capital issues nationally.

### VIRGINIA ASSOCIATION OF SCHOOL PERSONNEL ADMINISTRATORS (VASPA)

### **Executive Director.**

07/2015 - 10/2017

Serve as Executive Director of a professional association of K-12 Human Resources professionals across Virginia. Increased net reserves 1000% since July, 2015; expanded membership by 60%; expanded corporate sponsorship by 400%.

- Manage a dues-paying professional association as the Executive Director, and only staff member.
- Plan coordinate, and oversee professional development including two annual conferences.
- Interface on human resources/human capital needs on behalf of Virginia's 133 school divisions.
- Innovate new programming.
- Engage with members, would-be members, sponsors, and would-be sponsors.
- Support the governance and policies enacted by a six-person Board.
- Ensure financial compliance.
- Organize quarterly board meetings and keep board members engaged throughout the year.
- Interpret policy for Board and members.
- Explore new opportunities to build membership and support the development and advocacy of members.
- Serve as a thought leader on K-12 Human Capital issues in the state of Virginia.

### AMERICAN ASSOCIATION OF SCHOOL PERSONNEL ADMINISTRATORS (AASPA)

### **Interim Executive Director.**

01/2014 - 03/2014

Served as Interim Executive Director/CEO of AASPA for three months, representing 1400 school district human resources leaders and staff nationwide.

- Increased membership and oversaw the most-attended "Boot Camp" in AASPA History (as of 2014)
- Oversaw the general operations of the association until a permanent Executive Director was named.

### BELLINGHAM (WASHINGTON) SCHOOL DISTRICT

### **Executive Director of Human Resources/Consultant.**

11/2011 - 5/2015

Served as a Consultant from 11/2011 through 06/2012. Employed as Executive Director of Human Resources from 07/2012 through 06/2013. Served again as a Consultant from 07/2013 through early 2015.

- Served as a senior leader of the organization and member of the Executive Team.
- Managed budget of approximately \$1M.
- Oversaw reorganization of department protocols and improved customer relationships.

### PORTLAND (OREGON) PUBLIC SCHOOLS

### **Executive Director of Human Resources.**

07/2009 - 11/2011

Served as a Chief Human Resources Officer, assuming all aspects of human resources leadership for a workforce of 6800 employees.

- Served as chief advisor to the Superintendent and member of the Executive Team.
- Managed budget of approximately \$7M.
- Oversaw all aspects of Human Resources/Talent Management including managing seven directors and a department of 40 FTE.

### CANBY SCHOOL DISTRICT

### **Executive Director of Human Resources.**

07/2005 - 06/2009

Served as Chief Human Resources Officer, assuming all aspects of human resources leadership for a workforce of 550 employees.

### **EDUCATION**

- University of Washington. Certificate of School Leadership, 1997.
- University of Michigan. Masters of Arts in Secondary Education, 1993.
- Harvard University. Bachelor of Arts in English and American Language and Literature, cum laude, 1990.

### PROFESSIONAL ACCOMPLISHMENTS

- Board Member, Pride Fund, 2018 –
- Board Member, REALSchool Gardens, 2016 –
- Governing Board Member, American Association of School Personnel Administrators, 2012-2015.
- "Leveraging HR in the Board Room & Building Internal Capacity," American Association of School Personnel Administrators Human Capital Leadership Academy, December 2016, New Orleans, LA.
- "Analyzing and Aligning Compensation for your Classified and non-Represented Staff," American Association of School Personnel Administrators annual conference, October 2016, Orlando, FL.
- Keynote Speaker, Oregon School Personnel Association Annual Conference, Eagle Point, Oregon, April 2014; Welches, Oregon, July 2015.
- "Teacher Absence: Research Review and Ideas for Action," American Association of School Personnel Administrators annual conference, October, 2014, Portland, OR and Texas Association of School Personnel Administrators, December 2014, Austin TX.
- Keynote Speaker, Frontline Live Substitute Systems, San Francisco, California, December 2014.
- "An Outstanding Educator in Front of Them Every Day," District Administration Magazine, February, 2014.
- President/Executive Board member, Oregon School Personnel Association 2009-2011.
- Alumni Interviewer, Harvard College

2017					
0 – 3,000 Students	3,001 – 5,000 Students	5,001 – 7,500 Students	7,501 - 20,000 Students	20,001+ Students	
Bexley City SD (OH)	Beacon City Schools (NY)	Franklin Public Schools (MA)	Clarke County SD (GA)	Fairfax County PS (VA)	
2,274 Students, K-12	3,600 Students, K-12	5,447 students, PK-12	13,500 students, PK-12	183,000 students, PK-12	
Melissa LaCroix	Meredith Heuer 917.447.6562	Kevin O'Malley 774.571.8486	Charles Worthy, 706.255.7795	Sandy Evans, 571.423.1083	
Melissa.Lacroix@bexleyschools.org		·			
	Chappaqua Central SD (NY)	Hempstead Union Free School District (NY)	Crowley ISD (TX)	Garland ISD (TX)	
Harvard CUSD 50 (IL)	4,000 Students, K-12	6,000 Students, PK-12	15,200 Students, PK-12	57,400 Students, PK-12	
2,400 Students, PK-12	Allison Gardner 914.409.7696	Maribel Touré 516.434.4000	June W. Davis 817.292.6092	Larry H. Glick 972.475.4000	
Sandra Theriault stheriault@cusd50.org					
	Concord Public Schools & Concord-		Cupertino USD (CA)	Midland ISD (TX)	
Hunterdon Central Regional HS (NJ)	Carlisle Regional School District (MA)		18,000 students, PK-12	25,000 Students, PK-12	
2,990 Students, 9-12	3,355 students, K-12		Anjali Kausar 408.827.8336	Rick Davis 432.683.6686	
Deborah Labbadia 908.616.8588	Johanna Boynton 978.318.1500		,		
			El Rancho USD (CA)	Portland Public Schools (OR)	
Madison SD (NJ)	Duxbury Public Schools (MA)		8,800 students, PK-12	49,200 students, PK-12	
2,604 Students, K-12	3,250 students, PK-12		Dr. Aurora Villon, 562.965.8636	Amy Kohnstamm 503.913.3945	
Lisa Ellis 201.400.2349	Anne Ward, awarddux@verizon.net			,	
			Helena School District (MT)	Richmond City SD (VA)	
Orinda Union Elementary SD (CA)	Manhasset Union Free SD (NY)		8,200 students, PK-12	22,000 Students, PK-12	
2,529 Students, K-8	3,300 Students, K-12		Sarah Sullivan 406.465.1472	Dawn Pope 804.402.5000	
Julie Rossiter 925.408.1780	Regina Rule 914.602.1483			Thomas Farrell 804.513.0523	
jrossiter@orinda.k12.ca.us			L'Anse Creuse PS (MI)		
,	North Shore SD 112 (IL)		12,000 Students, K-12		
Pelham Public Schools (NY)	4,309 Students, PK-8		Amy Servial 586.822.9302.		
2,800 Students, K-12	Eric Ephraim 847.541.0076		amyservial@gmail.com		
Madeline Smith 646.209.5213	·		Dr. Terri Spencer 248.520.0334		
	Rescue Union SD (CA)		tmsedd@gmail.com		
Piedmont City USD (CA)	3,766 Students, PK-8				
2,706 Students K-12	Nancy Brownell, 916.769.7417		Richland SD (WA)		
Andrea Swenson 510.697.8567			13,400 Students, K-12		
aswenson@piedmont.k12.ca.us	Rye City SD (NY)		Rick Jansons, 509.528.3488		
	3,384 Students, K-12		rick.jansons@rsd.edu		
Richland SD88 (IL)	Katy Keohane Glassberg				
915 Students, K-8	glassberg.katy@ryeschools.org		Sequoia Union HSD (CA)		
Julie Starasinich 815.690.0674			9,000 Students, 9-12		
			Carrie DuBois, cdubois@cbnorcal.com		
Valhalla UFSD (NY)					
1,517 students K-12					
Bob lerace, 914.522.9581					
rierace@valhallaschools.org					



2016				
0 – 2,500 Students  Brisbane SD (CA) 450 students, TK-8 Leo Tingin 415.269.4149 Itingin@brisbanesd.org  Carlisle Public Schools (MA) 620 students PK-8 Melissa McMorrow 978.369.6550  CCSD 89 – Glen Ellyn (IL) 2,000 students PK-8	2,501 – 5,000 Students  Bedford Central School District (NY) 3,600 students K-12 Jennifer Gerken 914.262.3526  Jefferson UHSD (CA) 5,000 students 9-12 Rosie Tejada 415.250.5123  Laguna Beach USD (CA) 3,037 students K-12 Carol Normandin	2016  5,001 – 7,500 Students  Westport Public Schools (CT) 5,770 students PK-12 Michael Gordon mgordon@westport.k12.ct.us	7,501 - 20,000 Students  Campbell Union HSD (CA) 8,000 students 9 - 12 Linda Goytia 408.230.7414  Carlsbad USD (CA) 11,000 students, K-12 Claudine Jones 760.331.5000  Fairfield Public Schools (CT) 10,000 students PK-12 Philip Dwyer dwyer_philip@yahoo.com	20,001+ Students  Beaverton School District (OR) 40,725 students K-12 Anne Bryan 503.679.5040  Blue Valley SD 229 (KS) 22,000 students PK-12 Mike Seitz 913.226.7765  Houston ISD (TX) 215,000 students PK-12 Manuel Rodriguez 713.498.5649
Mike Nelson 773.469.7750  Gravenstein Union SD (CA) 748 students K-8 Jim Horn 707.823.1052  Harvey School District 152 (IL) 2,300 students PK-8 Gloria Johnson gjohnson@harvey152.org  Soquel Union Elementary SD (CA) 1,900 students PK-8 Judy McGooden 408.818.1263  South Bend Community School Corporation (IN) 1,039 students K-12 Jay Caponigro 574.274.7269 jay@jaycaponigro.com  Woodbridge School District (CT) 780 students, PK-6 Margaret Hamilton, 203.494.7591 mannham@sbcglobal.net	949.497.7700 ext. 5202  Minooka Community HSD #111 (IL) 2,700 students 9-12 Mike Brozovich mbrozovich@mchs.net  New Albany-Plain Local SD (OH) 4,882 students PK-12 Debra Kalinosky dkalinosky@earthlink.net  Walnut Creek ESD (CA) 3,600 students K-8 Katie Peña 925.287.0494		Manchester School District (NH) 15,000 Students PK-12 Debra Langton 603.669.8338  Santa Barbara Unified SD (CA) 15,500 students PK-12 Kate Parker kparker@sbunified.org  Stamford SD (CT) 16,000 students K-12 Geoff Alswanger 203.968.0233	Humble ISD (TX) 41,000 students PK-12 Robert Sitton 281.450.2472  Los Angeles USD (CA) 640,000 students PK-12 Steve Zimmer 213.241.6387  Northwest ISD (TX) 21,000 students PK-12 Mark Schluter 817.948.6425 Josh Wright 682.472.1846  Phoenix Union HSD (AZ) 27,000 students 9-12 Lela Alston 602.278.2002  Providence PSD (RI) 24,000 students PK-12 Nicholas Hemond 401.453.8600  Santa Ana Unified SD (CA) 56,000 students PK-12 John Palacio 714.542.0589



2015				
0 - 2,500 Students	2,501 – 5,000 Students	5,001 - 7,500 Students	7,501 - 20,000 Students	20,001+ Students
Galt Joint Union High SD (CA) 2,300 students 9-12 Terry Parker Owning 209.810.0720 Highland Falls-Fort Montgomery CSD (NY) 1,000 students K-12 Anne Lawless 914.588.0384 Northbrook/Glenview SD 30 (IL) 1,130 K-8 students Chuck Gitles 847.498.4190 cgitles@district30.org Rockridge CUSD #300 (IL) 1,100 students PK-12 Jeff Widdop 309.793.8001 Salem Elementary SD111 (IL) 970 students PK-8 Terry Barnfield 618.267.0514 Saratoga Union School District (CA) 2,100 students K-8 Arati Nagaraj 408.656.9137 Trevor-Wilmot Consolidated SD (WI) 565 students PK-8 Tom Steiner 262.862.2356	City Schools of Decatur (GA) 4,200 students PK-12 Annie Caiola 404.371.3601  Fayetteville-Manlius Central SD (NY) 4,420 students K-12 Marissa Joy Mims 315.682.3231  Freeport School District 145 (IL) 4,187 students PK-12 Janice Crutchfield janice.crutchfield@fsd145.org  Mahopac Central School District (NY) 5,000 students K-12 Michael Sclafani 914.939.1256  Montville Twp School District (NJ) 3,700 student K-12 Dr. Karen Cortellino Karen.Cortellino@Montville.net	Cambridge Public Schools (MA) 7,000 students PK-12 Mayor David Maher 303.249.6575 Barbara Allen 617.349.6441 ballen@cpsd.us  Centinela Valley Union HSD (CA) 6,600 students 9-12 Hugo M. Rojas II 310.263.3200  Flint Community Schools (MI) 7,000 students PK-12 Isaiah Oliver 810.210.6823 isaiah.m.oliver@gmail.com  Hudson School District #2611 (WI) 5,600 students K-12 Jamie Johnson 751.381.7105  Oak Park Elementary SD 97 (IL) 5,900 students PK-8 Bob Spatz bspatz@op97.org  Pemberton Township Schools (NJ) 5,000 students 9-12 Sandy Glawson glawson@pemb.org  Union Elementary SD (CA) 5,000 students K-8 Sheila Billings 408.888.3268	Bridgewater-Raritan RSD (NJ) 8,800 students K-12 Ann Marie Mead 732.216.7268 amead@brrsd.k12.nj.us  Eugene School District 4J (OR) 16,000 students K-12 Jim Torrey 541.790.7707  Franklin Township PS (NJ) 8,300 students PK-12 Edward Potosnak 732.745.1866  Jefferson County Schools (WV) 9,000 students PK-12 Scott Sudduth scottsud@gmail.com  Montgomery County PS (VA) 9,500 students PK-12 James Lyons 540-831-9864 joeylyons@mcps.org  Orleans Parish School Board (LA) 11,000 students PK-12 Nolan Marshall, Jr. 504.460.1496  San Mateo-Foster City SD (CA) 12,000 students PK-8 Audrey Ng 626.862.4582  South San Francisco USD (CA) 9,375 students PK-12 Rosa Acosta 650.754.3672  West Allis-West Milwaukee SD (WI) 9,877 students PK-12 Patricia Kerhin 414.604.3000	Boston Public Schools (MA) 57,300 students PK-12 Michael O'Neill 617.947.2967  Colorado Association of School Executive (CO) Executive Director Diana Sirko 970.618.1829  Montgomery County PS (MD) 154,000 students PK-12 Mike Durso 240.401.0674  Sioux Falls School District (SD) 23,000 students PK-12 Kent Alberty 605.941.3740



2014				
0 – 2,500 Students	2,501 – 5,000 Students	5,001 – 7,500 Students	7,501 - 20,000 Students	20,001+ Students
Clarke County Schools (VA)	Asheville City Schools (NC)	Accomack County Schools (VA)	City SD of New Rochelle (NY)	Loudoun County Schools (VA)
1,950 students PK-12	4,081 students PK-12	5,200 students PK-12	11,600 students PK-12	70,000 students PK-12
Janet Creager Alger 540.664.1163	Jacquelyn Hallum 828.258.8118	Ronnie Holden 757.710.1830	David Lacher 914.671.2171	Eric Hornberger 571.291.5685
Green Brook Township PS (NJ)	Katonah-Lewisboro SD (NY)	Baldwin Union Free SD (NY)	Eanes ISD (TX)	Virginia Beach City PS (VA)
930 students K-8	3,200 students, K-12	5,000 students K-12	7,803 students K-12	70,259 students K-12
James Benscoter benscoter@gbtps.org	Marjorie Schiff 516.972.3614	Mary Jo O'Hagan 516.589.2994 ohaganmaryjo@gmail.com	Rob Hargett 512.415.4656 rhargett@eanesisd.net	Dan Edwards 757.263.1016
Haldane Central School District (NY)	North Plainfield School District (NJ)	3 131 1 7,103		
883 students K-12	3,152 students K-12	Cleveland Heights-University Heights	East Brunswick PS (NJ)	
Jennifer Daly 917.450.1630	Linda Bond-Nelson 908.922.0377	City School District (OH)	8,309 students K-12	
		5,800 students PK-12	Brad Cohen 732.613.6700	
Maple Dale-Indian Hill SD (WI)	Princeton Public Schools (NJ)	Ron Register 216.403.4708		
500 students K-8	3,800 students PK-12	r_register@chuh.org	Portsmouth Public Schools (VA)	
Chris Soyke 414.540.4092	Timothy Quinn 609.921.0428		15,200 students PK-12	
		Evanston-Skokie SD 65 (IL)	James Bridgeford 757.434.2567	
Moffat County SD RE-1 (CO)	Somerville Public Schools (MA)	7,082 students PK-8		
2,402 students PK-12	4,987 students PK-12	Traci Quattrocki 847.859.8005	Rowland Unified SD (CA)	
J.B. Chapman 970.846.2671	Paul Bockelman 617.833.8883		14,000 students K-12	
		Lexington Public Schools (MA)	Heidi Gallegos	
Palos CCSD 118 (IL)	Summit Public Schools (NJ)	6,600 students PK-12	heidigallegos@gmail.com	
1,882 students PK-8	4,100 students K-12	Margaret Coppe	Objective District #440 (MA)	
Sheila Pacholski 312.835.3589	Celia Colbert 908.399.6131	mcoppe@sch.ci.lexington.ma.us	Shoreline District #412 (WA)	
Dana Vallari Cabaal Diatriat (CA)	Wilton Dublic Cobools (CT)	Line Mar Community CD (IA)	9,000 students PK-12	
Ross Valley School District (CA) 2,200 students PK-8	Wilton Public Schools (CT)	Linn-Mar Community SD (IA)	Mike Jacobs or Debi Ehrlichman 206.393.6111	
	4,320 students PK-12	7,000 Students PK-12	200.393.0111	
Anne Capron 415.686.2926	Bruce Likly 203.722.6474	Tim Isenberg, tisenberg@linnmar.k12.ia.us	Toms River Regional Schools (NJ)	
Roselle School District #12 (IL)		liseriberg@iiiTiTiar.k12.ia.us	17,000 students K-12	
690 students K-8		Parsippany-Troy Hills SD (NJ)	Joseph Torrone jtorrone@trschools.com	
Lisa Mondo 630.240.1709		7,300 students PK-12	Joseph Torrone jtorrone@trscrioois.com	
LISA MONDO 030.240.1709		Fran Orthwien 973.263.7200		
		orthweinr@aol.com		
		orthweim@aor.com		
		Ridgefield Public Schools (CT)		
		5,500 students K-12		
		Austin Drukker 203.894.5550		
		Woodstock CUSD 200 (IL)		
		6,145 students PK-12		
		Paul Meyer 815.337.2503		



2013				
0 – 2,500 Students	2,501 - 5,000 Students	5,001 – 7,500 Students	7,501 - 20,000 Students	20,001+ Students
Fox Point-Bayside Schools (WI) 500 students PK-8 Deb Friberg deb_friberg@hotmail.com	Belmont-Redwood Shores SD (CA) 3,600 students K-8 Robert Tashjian 650.520.5354	Oconomowoc Area Schools (WI) 5,100 students PK-12 Don Wiemer 262.490.0804	Alvord Unified SD (CA) 19,812 students K-12 Art Kaspereen artjr@gmail.com	Fairfax County Schools (VA) 186,000 students PK-12 Ilryong Moon 703.409.0270
High Point Regional HS District (NJ) 800 Students 9-12 Paul Derin 973.875.7205	Monona Grove School District (WI) 3,121 students PK-12 Susan Fox 608.222.5015	Passaic City SD (NJ) 7,000 students PK-12 Byron Bostos 973.470.5500	Decatur Public Schools (IL) 9,000 students PK-12 Brian Hodges 217.877.8901	Fort Bend ISD (TX) 69,000 students PK-12 Jim Rice 832.563.2942
Nicolet High School (WI) 1,300 students 9-12 Marilyn Franklin 414.352.1180	Tukwila School District (WA) 2,920 students K-12 Mark Wahlstrom wahlsea@yahoo.com	Piscataway Twp Schools (NJ) 7,200 students K-12 Tom Mosier tmosier@pway.org	Portage Public Schools (MI) 8,700 students K-12 Robert Snyder 269.381.3585	Indianapolis Public Schools (IN) 30,000 students PK-12 Diane Arnold 317.679.8844
Portola Valley School District (CA) 700 students PK-8 Jocelyn Swisher 650.851.1777		Shaker Heights City Schools (OH) 5,500 students K-12 Annette Sutherland 216.991.8573	San Leandro Unified SD (CA) 8,800 students K-12 Diana J. Prola 510.483.0744	Jersey City Public Schools (NJ) 26,000 students PK-12 Suzanne Mack 201.344.7599
Public Schools of the Tarrytowns (NY) 2,100 students PK-12 Mimi Godwin 914.564.9621		St John the Baptist Parish SD (LA) 6,253 students PK-12 Gerald Keller 504.628.5277		Round Rock ISD (TX) 47,328 students PK-12 Catherine Hanna 512.731.6604
Secaucus School District (NJ) 2,190 students PK-12 Jack McStowe jmcstowe@sboe.us		Syosset Central SD (NY) 6,527 students K-12 Michael Cohen 516.567.7780 mcgrateful@gmail.com		Stafford County PS (VA) 27,463 students PK-12 Stephanie Johnson 540.295.0233 johnsonsj@staffordschools.net
Sunnybrook SD 171 (IL) 1,015 students K-8 Lance Lape 708.895.7790		mograteful@gmail.com		joinisonsjæstanordsonoois.Het
Tuckahoe Union Free SD (NY) 1,100 students K-12 Julio Urbina 212.239.3030				
Watchung Hills Regional HS (NJ) 2,068 students 9-12 Robert Horowitz 732.563.1122				



### A Proposal Prepared for

# Lebanon Community Schools Lebanon, Oregon

for

# The Search and Selection of a Superintendent of Schools

submitted by



EXECUTIVE RECRUITMENT & DEVELOPMENT



11725 Arbor Street, Suite 220 Omaha, Nebraska 68144 Phone: 888-375-4814/402-991-7031 Fax: 402-991-7168

Email: <u>mail@macnjake.com</u> Website: www.macnjake.com



11725 Arbor Street, Suite 220 ◆ Omaha, Nebraska 68144 ◆ 402-991-7031/888-375-4814 Fax: 402-991-7168 ◆ Email: <u>Mail@macnjake.com</u> ◆ Website: www.macnjake.com

September 24, 2018

Board of Directors Lebanon Community Schools 485 South 5<sup>th</sup> Street Lebanon, Oregon 97355

Thank you for the opportunity to respond to your request for information. The enclosed proposal describes the professional services McPherson & Jacobson, L.L.C. will provide Lebanon Community Schools in ensuring your superintendent search secures quality leadership for the district.

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

With over 100 consultants across the United States, McPherson & Jacobson has been successfully conducting searches for governing boards since 1991.

Our contact information:

McPherson & Jacobson, L.L.C. 11725 Arbor St., Suite 220 Omaha, Nebraska 68144 Telephone: 402-991-7031/888-375-4814

Fax: 402-991-7168

Email: mail@macnjake.com

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

Sincerely,

### Thomas Jacobson

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

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### The McPherson & Jacobson Difference

### "It's About the Kids"

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

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

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

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

#### **Leading National Search Firm**

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 700 superintendents** and other officials in public and non-profit organizations across the United States. **McPherson & Jacobson is one of the leading national superintendent search firms.** 

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

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

#### Sustainability in Leadership

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

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

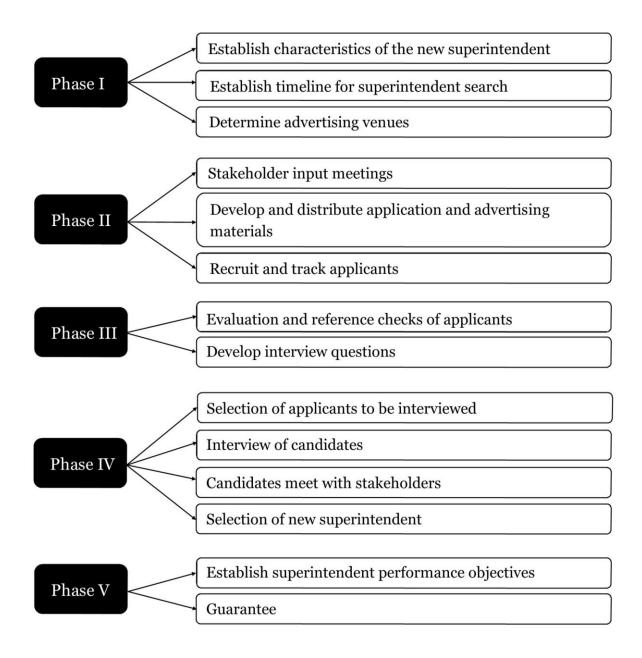
### Executive Summary

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

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

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

## Five Phases of a Superintendent Search



#### Phase I

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

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

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

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

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

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

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

### ✓ Identify appropriate stakeholder groups.

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

#### $\checkmark$ Assist the board in determining compensation parameters.

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

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

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

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

#### Phase II

In Phase II McPherson & Jacobson's consultants will:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

#### **✓** Confidentiality of Applicants

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

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

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

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

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

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

#### Phase III

In Phase III McPherson & Jacobson's consultants will:

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

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

#### **✓** Conduct reference checks.

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

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

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

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

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

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

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

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

Priscilla Cox, Elk Grove Unified School District, CA

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

Kevin West, Arkansas Arts Academy, Rogers, AR

#### Phase IV

In Phase IV McPherson & Jacobson's consultants will:

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

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

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

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

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

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

#### ✓ Coordinate interview and visitation procedures.

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

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

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

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

any concerns or questions the group may have. Each form will be sealed in an envelope and turned in to the district contact person.

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

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

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

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

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

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

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

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

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

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

#### **✓** Conduct background checks.

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

#### Phase V

In Phase V McPherson & Jacobson's consultants will:

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

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

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

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

#### **✓** Provide a guarantee.

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

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

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

John Rice, Twin River Public Schools, Genoa, NE

#### Timeline

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

#### Search sequence:

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

# Responsibilities of Lebanon Community Schools and McPherson & Jacobson, L.L.C.

Event	McPherson & Jacobson's Tasks
1 <sup>st</sup> board meeting	□ The consultant guides the board in determining the following items
After 1 <sup>st</sup> meeting	<ul> <li>□ Application link is posted online</li> <li>□ Brochure announcing the vacancy is created</li> <li>□ Advertising is started</li> <li>□ Vacancy announcements are sent out</li> <li>□ E-mails are sent to applicants registered with McPherson &amp; Jacobson notifying them about the opening</li> <li>□ E-mails are sent to consultants regarding the opening, requesting they invite candidates to apply for the position</li> <li>□ Opening is posted on social media and additional venues</li> </ul>
During application period	<ul> <li>□ Consultants recruit candidates that fit the position</li> <li>□ Monitors applicants and where they are in the application process</li> <li>□ Notifies applicants of the closing date for submitting their materials</li> <li>□ Lead consultant keeps the board up-to-date on the search</li> </ul>
Stakeholder meetings are scheduled	☐ Home Office sends out invitations to the community stakeholder meeting(s) after receiving the information from the consultant and the district
Stakeholder meetings	<ul> <li>Consultants facilitate the stakeholder meetings, recording the input</li> <li>An online stakeholder input survey is created, the link is posted on the McPherson &amp; Jacobson website and also provided to the district to post</li> </ul>
Stakeholder meetings completed	<ul> <li>Consultant summarizes key themes and gives the results to the district</li> <li>Copy of summary is sent to Home Office</li> <li>The stakeholder input summary report is created</li> </ul>
2 <sup>nd</sup> board meeting	□ Review stakeholder input summary report and provide copies to the district □ The consultant guides the board in determining the following items ○ Interview questions ○ Length of contract, moving and interview expenses ○ Spouse/significant other's involvement in interview process ○ District Interview Schedule ○ Candidate Daily Interview Schedule □ Interview questions are sent to Home Office to be formatted
Prior to 3 <sup>rd</sup> board meeting	<ul> <li>Applicant packets are reviewed by the consultants and reference checks are performed</li> <li>Contact candidates on short list and verify their interest in the position</li> <li>Meet with stakeholder group chairs to review schedule, procedures, and screen questions</li> </ul>

Event	McPherson & Jacobson's Tasks
3 <sup>rd</sup> board meeting	<ul> <li>□ The consultant facilitates the board's         <ul> <li>○ Review of the list of all applicants</li> <li>○ Overview of candidates on short list</li> <li>○ Selection of finalists</li> <li>○ Finalizing of interview dates &amp; schedule</li> <li>○ Review of interview questions &amp; procedures</li> <li>○ Finalizing candidate &amp; spouse/significant other arrangements</li> </ul> </li> <li>□ Contact finalists and schedule interview dates, review schedule, discuss compensation and contractual issues</li> <li>□ Work with Point of Contact to coordinate interviews (transportation, lodging, interview locations, etc.)</li> <li>□ Send Candidate Daily Interview Schedule to each finalist</li> <li>□ Notify the applicants who were not selected to be interviewed</li> </ul>
Interviews	□ Call Point of Contact after 1 <sup>st</sup> interview to learn how it went □ Call 1 <sup>st</sup> candidate to learn their perspective and how the interview went □ Suggest any possible improvements □ Be available for questions □ Be present at interviews if request is made by school district (additional fee for this service)
Finalist selected and accepted	<ul> <li>□ Call and make offer to candidate</li> <li>□ Verify acceptance</li> <li>□ Conduct criminal/financial/credential verification check on selected candidate</li> <li>□ Call other finalists</li> <li>□ Sends out letter of congratulations to candidate who was chosen</li> </ul>
Phase V	<ul> <li>☐ Facilitate board and superintendent's identification of 2-3 performance objectives and evidence of progress the board will accept</li> <li>☐ Consultant reviews superintendent's plan</li> </ul>

## **Lebanon Community Schools**

Event	School District's Tasks
1st Board	Provides consultant with the necessary information to create the
Meeting	brochure; the name of the Point of Contact; and the board member list
	□ Reviews the brochure
Community	<ul> <li>Names and addresses are sent to Home Office for community member</li> </ul>
meetings are	stakeholder meeting invitations
scheduled	<ul> <li>Notifies internal stakeholders of times and locations for stakeholder</li> </ul>
	meetings
	<ul> <li>Posts dates, times and locations of meetings and public forum(s) and</li> </ul>
	encourages stakeholder attendance
	<ul> <li>Publishes link to online stakeholder input survey</li> </ul>
3 <sup>rd</sup> board	Board decides if they wish to conduct semi-finalist interviews
meeting	<ul> <li>Assist with lodging arrangements and welcome gifts</li> </ul>
	<ul><li>Arrange for spouse/significant other tour</li></ul>
	<ul> <li>Arrange logistics for stakeholder focus groups</li> </ul>
Semi-finalist	The board interviews each semi-finalist
Interviews	The board determines the finalists to be interviewed
Interviews	One candidate per day
	Board member greets each candidate upon arrival to district
	<ul> <li>Coordinates candidate's meeting with stakeholder focus groups and</li> </ul>
	retrieval of input forms
	☐ Informal interview-social setting
	☐ Formal interview
	☐ Spouse/significant other's visitation is coordinated
Meeting to	<ul> <li>Board members meet and discuss each candidate individually</li> </ul>
Select	☐ Individually rank order candidates
Finalists/	Read input forms submitted by stakeholder focus groups
Finalist	☐ Select minimum of #1 and #2 candidates
selected and	□ Contact consultant with selection results
accepted	□ Send interview forms and files to the Home Office
	☐ Board completes an evaluation of the search service provided by
DI 1/	McPherson & Jacobson
Phase V	<ul> <li>Superintendent creates plan with target objectives and timelines</li> </ul>
	☐ Board adopts plan
	☐ Send copy of plan to Home Office

## Consultants for Search

### Steven Lowder 4605 NW 139<sup>th</sup> Loop Vancouver, WA 98685

Email: s\_lowder@macnjake.com

Phone: 951-719-6551

#### **Educational Background**

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

#### **Professional Experience**

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

#### Robert J. Clark

#### Box 53, 96 S. Andrea

#### Milton-Freewater, OR 97862

Email: r\_clark@macnjake.com Phone: 505-387-0234

#### **Educational Background**

Ed.D.	2001	Peabody College at Vanderbilt University	Educational Leadership
M.S.	1986	Washington State University	Physical Education
B.S.	1981	Washington State University	Physical Education

#### **Professional Experience**

	Date	es	Title	District	Location	Enrollment
2017	to	Present	Consultant	McPherson & Jacobson, L.L.C.	Omaha, NE	
2013	to	Present	Superintendent	Milton-Freewater USD	Milton- Freewater, OR	1,750
2010	to	2013	Special Programs Director	Eastmont School District	East Wenatchee, WA	5,500
2006	to	2008	Adjunct Professor	Heritage University	Toppenish, WA	
2004	to	2010	Superintendent	Cascade School District	Leavenworth, WA	1,300
2002	to	2004	Adjunct Professor	Washington State University	Pullman, WA	
1997	to	2004	Superintendent	Reardan-Edwall School District	Reardan, WA	650
1995	to	1997	Superintendent	Quilcene School District	Quilcene, WA	300
1990	to	1993	Superintendent	Washtucna School District	Washtucna, WA	115

### **Professional Organization Memberships**

Name of Organization		Date	S	Offices Held
Confederation of Oregon Administrators (COSA)	2017	to	2020	OASE Executive Committee
Resolutions Committee (AASA)	2001	to	2003	Member
National Small and Rural School District Committee (AASA)	2000	to	2001	Chairman
National Small and Rural School District Committee (AASA)	1999	to	2002	Member

#### Dr. Nathan McCann

### 2306 N. 4<sup>th</sup> Way Ridgefield, WA 98642

 $Email: n\_mccann@macnjake.com$ 

Phone: 520-609-6518

#### **Educational Background**

Ed.D.	2011	University of Arizona	Educational Leadership
Principal Certification Program	2004	University of Texas	
M.Ed.	2003	University of Vermont	Curriculum/Instruction
B.A.	1995	University of Vermont	Political Science

#### **Professional Experience**

	Dat	tes	Title	District	Location	<b>Enrollment</b>
2015	to	Present	Consultant	McPherson & Jacobson, L.L.C.	Omaha, NE	
2014	to	Present	Superintendent	Ridgefield School District	Ridgefield, WA	3,000
2010	to	2014	Superintendent	Altar Valley School District	Tucson, AZ	1,000
2006	to	2010	H.S. Asst. Principal- Curriculum/ Instruction	Flowing Wells Unified District	Tucson, AZ	5,000
2005	to	2006	Asst. Principal/ Athletic Dir.	Flowing Wells Unified District	Tucson, AZ	5,000
1999	to	2005	Teacher/Coach	Multiple Districts		

#### **Professional Recognition/Awards**

Date	Name of Award	State
2015	All-Arizona Superintendent of the Year Award for Small-Size Districts	AZ
2012	Inside Tucson Business Up and Comer	AZ
2011	Arizona School Administrators Outstanding Dissertation Award	AZ
2010	Named a CNN Intriguing Person of the Day	
2010	Virco/NASSP National Assistant Principal of the Year	

#### Investment

#### The investment for conducting the superintendent search is \$12,500 for Phases I-V.

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.

Expenses in addition to the consulting fee are: cost of media advertisement selected by the board; office expenses; telephone charges for reference checks; travel and expenses for consultants in district visits; consultants' attendance at the interviews or additional meetings. All expenses will be explained and agreed to prior to the commitment of the search process. McPherson & Jacobson is willing to provide a maximum not to exceed amount, which includes the fee and expenses.

#### **Estimate of expenses:**

Advertising Expenses	\$ 1,000*
Travel Expenses	\$ 2,440**
Office Expenses	\$ 800***
Video interviews of short list candidates (\$50/candidate)	\$ 250^
Criminal/Financial Background Checks	\$ ****

- \* Includes 30 days on American Association of School Administrators website (AASA.org) and 30 days on TopSchoolJobs.org, this amount will increase if the board chooses additional advertising media.
- \*\* Includes travel, lodging, and meals for all consultants for the trips included in the proposal to the district. (This expense includes one (1) team of two (2) consultants for one (1) day of stakeholder meetings. This amount may decrease or increase dependent upon the number of stakeholder meetings the board chooses to have McPherson & Jacobson conduct.)
- \*\*\* Includes development and printing of Announcement of Vacancy, copying costs, telephone expenses, and postage
- ^Estimated based on a majority of searches having five shortlist candidates. The expense will vary based on the number of shortlist candidates.
- \*\*\*\*\* Included in the fee is the criminal/financial/credential verification background check for the selected candidate. If the board chooses to conduct background checks on all the finalist candidates, the district will be charged the actual cost for the background check, a minimum of \$125 per candidate.

#### NOTE:

- Interview expenses for the candidates are not included in the expenses listed above.
- There is an additional fee and expenses for the consultants to attend the interview sessions.

#### **Additional Services:**

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

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

# Price Breakdown for Search Activities

Phase	<b>Description of Services</b>	Fee	Expenses	Additional Costs/Notes
I	Meet with board to start search process. Start development of application materials. Initiate advertising.	\$2,500	\$1,950	Expenses include consultant travel and \$1,000 in advertising costs. Advertising costs are determined by the media selected by the board; therefore, this amount is an estimate only.
П	Conduct stakeholder input meetings. Begin candidate recruitment.	\$3,000	\$800	Expenses are based on one (1) team of two (2) consultants conducting stakeholder meetings for one (1) day. If the board chooses additional meetings beyond the one (1) day, the expenses will increase.  The fee for additional days of stakeholder meetings is \$500 per day per consultant plus expenses.
III	Continue candidate recruitment. Conduct reference checks on applicants.	\$3,000	\$300	Expenses include office expenses for candidate recruitment and conducting reference checks.
IV	Meet with the board to review applicants and identify finalists to be interviewed. Assist board with interview questions and schedule. Coordinate candidate visits to the district.	\$2,500	\$1,200	Expenses include preparation of materials, consultant travel expenses and video interviews of five (5) candidates.  Fee does not include consultants being present for the interviews. If the board requests a consultant be present for the interviews, the additional fee is \$500 per day plus expenses.
V	Meet with the board to determine the superintendent performance objectives.	\$1,500	\$240	Expenses include preparation of materials and consultant travel expenses.
Totals		\$12,500	\$4,490	Fees and/or expenses will increase if  • the board chooses advertising media over \$ 1,000;  • the board requests more than one (1) day of stakeholder input sessions;  • the board requests more than 5 shortlist candidate videos  • the board requests consultants be present at meetings not included above, including interviews;  • actual travel costs increase due to changing prices.
	Total*	\$16,990		*based on parameters above

#### Stakeholder Involvement

#### **Initial stakeholder input sessions**

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

#### Meeting the candidates

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

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

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

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

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

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

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

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

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

### Transparency—The McPherson & Jacobson Difference

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

#### An open process

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

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

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

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

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

Taken in part from the Sioux City Journal, April 15, 2008. www.Siouxcityjournal.com

#### Open search process, solid choice

"

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

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

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

"…

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

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

### Wake names three superintendent finalists

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

"

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

"

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

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

"…"

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

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

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

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

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

. . .

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

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

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

...;

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

### **Opinion**

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

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

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

## An open superintendent search process is good for the community

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

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

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

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

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

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

#### **Conducting a super search**

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

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

"

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

"

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

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

"…"

Taken in part from

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

#### **Board of Education Scores New Superintendent**

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

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

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

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

## Fayette school board might announce superintendent finalists Tuesday

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

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

"

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

"…"

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

#### **Public or Secret: Districts Hire Top Leaders Differently**

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

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

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

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

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

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

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

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

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

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#### **Editorial**

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

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

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

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

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

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

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

#### Wake wise to announce superintendent final

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

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

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

"…"

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

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

- "... The Board of Education...chose to hire the executive recruiting and development service, McPherson and Jacobson, to find Westside's next leader.
- "'The board, in an open meeting, defined what we saw as our key objectives—what are the criterial? What are the qualities we would like to see in our next superintendent?' said Scott Hazelrigg, one of the directors on the Board of Education...
- "McPherson and Jacobson used the criteria the board established and the Stakeholders input report to select certain individuals to encourage applying.

. . . .

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

. .

- "Though the board will ultimately make the decision about who the next superintendent will be, students received the opportunity to be involved in the process.
- "'One of the things we liked about the consultant was that they historically engaged a student group in the process,' Hazelrigg said.
- "Every morning a small group of juniors and seniors gathered in the conference room to meet the candidates....
- "The questions the student panel asked included, 'Why/how do you feel the input from the students is necessary when making choices?' and 'How do you make sure all students' needs are met with so much diversity?'
- "Junior Maddie Ryan led the student panel. Ryan prepared for the interviews by compiling questions suggested by the search firm in addition to those students requested, and doing preliminary research on the candidates.
- "'I think that it's a really great opportunity that they are asking students, and I hope that whoever the superintendent is will continue to have student involvement,' Ryan said.
- "During the interviews, all students were engaged by asking candid questions and diligently taking notes.
- "'Everyone is pretty engaged; they are asking intelligent, thoughtful questions,' Ryan said.
- "...Other focus groups include teachers, key community members and members of the Westside Foundation.
- "The student interviews allowed the board not only to get insight into what the students thought of the candidates, but also provided the candidates with an opportunity to hear from the students.
- "'There aren't any adults here, which is really nice because I think students are more open, and I feel the candidates are more receptive because you're not worried about what sounds good or what would offend someone,' Ryan said.
- "'I think it gives [the candidates] really good insight, and us a really good insight too,' Ryan said."

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

## A Community Effort for a Community Superintendent FIRM DECISION

#### District hires unbiased executive search firm

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

. . .

- "Five different panels—a student, Westside Foundation, volunteer, teacher and administrative panel—interviewed each candidate separately.
- "All five panels submitted a formal write-up detailing their opinions of the five candidates. The school board will take the panels' opinions into consideration when making the final decision.

. . .

- "...we believe hiring an experienced form to help with selecting our next superintendent was a great idea
- "McPherson and Jacobson was responsible for bringing in 28 candidates from all over the country, giving the district greater variety than it would have had choosing a superintendent internally.
- "The firm also oversaw a more extensive selection process. It suggested the district create the five panels to interview each candidate, helped choose the panels and provided questions the panels should ask the candidate.
- "The superintendent deals with the entire community, so it is only logical that the decision is a community effort.

. . .

- "'[The school board] gained a student opinion, a thoughtful, careful consideration of us and what we want in a superintendent, which they can't always get themselves,' senior and student panelist Jacob Lehr said.
- "This process allowed each group to offer its unique perspective and will encourage the school board to choose a well-rounded candidate.

. .

- "In addition, this extensive process will hopefully produce an unbiased decision."
- "'I was very pleased with how with how it went,' [Principal Maryanne] Ricketts said. 'I like how all the Stakeholder groups were involved. I liked that we had a student group who met with each candidate. Everybody took this very seriously. The groups gave the school board good feedback.'
- "Every part of the process went through the firm, and, as a result, the process went smoothly.
- "The *Lance* believes the school board made the correct decision in hiring McPherson and Jacobson to assist in the superintendent search."

Taken in part from Westside Lance, Spring 2012

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

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

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

. . .

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

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

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

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

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

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

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

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

• • •

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

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

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

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

To: t\_jacobson@macnjake.com

Subject: Thank you

Mr. Jacobson

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

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

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

#### Nancy Van Beek

KSDC Education Manager

Washington Pavilion of Arts and Science

301 S. Main Ave.

Sioux Falls SD 57104

(605 367-7307 ext 2374

www.washingtonpavilion.org

From: Laura Bednar

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

To: t\_jacobson@macnjake.com

Subject: thank you

Dear Dr. Jacobson

. . . . .

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

Thank you again,

Laura Bednar Superintendent Stuttgart School District

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

#### BOARD OF EDUCATION

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

#### SUPERINTENDENT

Jeffrey L. Baarstad, Ph.D.



June 3, 2015

To Whom It May Concern:

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

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

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

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

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

Betsy Connolly DVM

Phone: 805.497.9511

www.conejousd.org

info@conejousd.org

1400 East Janss Road

Thousand Oaks, CA 91362

## EATONVILLE SCHOOL DISTRICT

Superintendent Rich D. Stewart

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

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

June 21, 2013

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

Dear Dr. Jacobson,

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

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

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

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

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

Respectfully,

Robert Homan Board President Eatonville School District #404

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

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#### LITTLE ROCK SCHOOL DISTRICT

#### OFFICE OF THE SUPERINTENDENT

March 1, 2013

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

Dear Dr. Jacobson:

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

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

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

Sincerely,

Dianne Curry, President LRSD Board of Directors

810 West Markham Street • Little Rock, Arkansas 72201 • (501) 447-1002

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

"…

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

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

Thanks,

Connie McElyea

Moline [Illinois] Board of Education



Reynolda School District Administration Offices 1204 NE 201\* Avenue Fairview, OR 97024 503.661.7200 • 28x 503.667.6932

April 26, 2012

#### To Whom It May Concern:

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

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

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

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

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

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

Respectfully,

Theresa Delaney Davis

Theresa Delaney Davis Chair

A great place for learning.

www.reynolds.k12.or.us/schools/

**Great Valley School District** 

47 Church Road Malvern, PA 19355 Phone 610-889-2100, ext. 2112 www.gysd.org



BOARD OF SCHOOL DIRECTORS

November 10, 2009

Mr. Tom Jacobson McPherson & Jacobson, LLC 7905 L St., Suite 310 Omaha, NE 68127

Dear Tom:

I wanted to take a moment to offer my sincere appreciation for all your help in our recent superintendent search.

While hiring a superintendent may be a Boards' most important responsibility, it isn't something any of us do on a regular basis if ever at all. I can't imagine trying to make our way through this without your guidance. You brought us a process that was able to meet the needs of our community. You told us to trust the process, we did, and it worked.

On behalf of the Board and the entire District, I want to extend our thanks to you and all your colleagues at McPherson & Jacobson for a job well done.

Sincerely,

Beth McGarrigle Board President

Great Valley High School • Great Valley Middle School • Charlestown Elementary School • Kathryn D. Markley Elementary School • General Wayne Elementary School Equal Opportunity Employer

From: Zweiback, Rose [mailto:zweibackr@unmc.edu]

Sent: Monday, November 05, 2012 8:25 AM

**To:** Thomas Jacobson, Ph.D.

**Subject:** Testimonial

Working with McPherson & Jacobson made our superintendent search a smooth and organized process. Our consultants were our partners. We set the parameters and the goals and they provided the expertise. We wanted the search to invite input from our stakeholders and involve them as much as possible. At the same time, the board had full responsibility for the selection.

I found the consultants from McPherson & Jacobson to be outstanding professionals who provided services of the highest quality. They presented our board with a slate of excellent candidates and then let us do the work of interviewing and selecting the best choice for our district. We appreciated their work, especially the follow-up services in setting evaluation goals for our new superintendent.

I heartily endorse McPherson & Jacobson.

Rosie Zweiback

Vice President

Westside Community Schools Board of Education

Rzweiback@weatside66.org

7905 L STREET, SUITE 310 ◆ OMAHA, NEBRASKA 68127 ◆ 402-991-7031/888-375-4814 FAX: 402-991-7168 ◆ EMAIL: MAIL@MACNJAKE.COM ◆ WEBSITE: WWW.MACNJAKE.COM

Comments/references from Westside Community Schools, Omaha, Nebraska

November 6, 2012

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

#### Dear Tom:

McPherson & Jacobson's guidance and support were invaluable throughout Westside Community Schools' superintendent search in 2012. Time and perspective have enabled me to identify what for me were your most important contributions to the process.

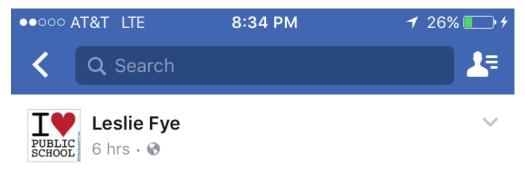
- Focus: The Board discussion and consensus on the key attributes to be sought in candidates for our position a key step in McPherson & Jacobson's recommended process maintained the focus of the search on the Board's top priorities.
- Responsiveness: McPherson & Jacobson responded to our requests for assistance, predictable or last minute, in a timely and professional manner.
- National Reach: The benefits of your national network of consultants were evident both in the field of candidates you were able to access as well as in your ability to vet those candidates effectively.
- Integrity: Superintendent searches are notoriously stressful for school boards.

  McPherson & Jacobson dealt with the difficult and unexpected turns in the process with unwavering integrity and professionalism.

Although my term on the Westside School Board concluded prior to our new superintendent taking office, by all reports he has distinguished himself already in the first few months of what will hopefully be a long tenure. It is no exaggeration to say that we could not have found such an outstanding and experienced leader without you. My sincere thanks to you and Dr. Randy Nelson for your support.

Best regards,

Kathleen Bradley



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



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

#### Applicant Diversity

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

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

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

2017-2018	Search Year	School District/Entity	Person Placed
2017-2018	2017-2018	Foreman School District, AR	Mrs. Patricia Tankersley
2017-2018 Fort Sage Unified School District, Herlong, CA 2017-2018 Madison County School District, Ridgeland, MS 2017-2018 Roseville Joint Union High Dr. Denise Herrmann School District, CA 2017-2018 Mabton School District, WA Mr. Joseph Castilleja Dr. Colleen Hawkins Santa Carlita, CA 2017-2018 Denair Unified School District, Dr. Colleen Hawkins Santa Carlita, CA 2017-2018 Reynolds School District, Fairview, OR Dr. Danna Diaz Pray Ms. Darnella Pray 2017-2018 Soap Lake School District, Fairview, OR Dr. Danna Diaz Ms. Darnella Pray 2017-2018 East End School District, Bigelow, AR Ms. Lori Edgin Dr. Pamela Dodge Dr. Pamela Dodge Dr. Amanda Ross Dr. Liberty Elementary Schools, IA Dr. Pamela Dodge Dr. Amanda Ross Dr. Lori Shough Ellensburg School District, WA Mrs. Jinger Haberer Parlier Unified School District, CA Mr. Jamie Robles 2017-2018 Ellensburg School District, WA Mrs. Jinger Haberer Parlier Unified School District, CA Dr. Amy Alzina Santa Barbara, CA 2016-2017 Cold Spring School District, Dr. Amy Alzina Santa Barbara, CA 2016-2017 School District of Fort Atkinson, WI Starkville Oktibbeha Consolidated School District, MS 2016-2017 Richland School District, MS 2016-2017 Richland School District, MS	2017-2018	Jackson Public Schools, MS	•
2017-2018 Fort Sage Unified School District, Herlong, CA 2017-2018 Madison County School District, Ridgeland, MS 2017-2018 Roseville Joint Union High Dr. Denise Herrmann School District, CA 2017-2018 Mabton School District, WA Mr. Joseph Castilleja Dr. Colleen Hawkins Santa Carlita, CA 2017-2018 Denair Unified School District, Dr. Colleen Hawkins Santa Carlita, CA 2017-2018 Reynolds School District, Fairview, OR Dr. Danna Diaz Pray Ms. Darnella Pray 2017-2018 Soap Lake School District, Fairview, OR Dr. Danna Diaz Ms. Darnella Pray 2017-2018 East End School District, Bigelow, AR Ms. Lori Edgin Dr. Pamela Dodge Dr. Pamela Dodge Dr. Amanda Ross Dr. Liberty Elementary Schools, IA Dr. Pamela Dodge Dr. Amanda Ross Dr. Lori Shough Ellensburg School District, WA Mrs. Jinger Haberer Parlier Unified School District, CA Mr. Jamie Robles 2017-2018 Ellensburg School District, WA Mrs. Jinger Haberer Parlier Unified School District, CA Dr. Amy Alzina Santa Barbara, CA 2016-2017 Cold Spring School District, Dr. Amy Alzina Santa Barbara, CA 2016-2017 School District of Fort Atkinson, WI Starkville Oktibbeha Consolidated School District, MS 2016-2017 Richland School District, MS 2016-2017 Richland School District, MS	2017-2018	McCleary School District, WA	Ms. Shannon Ramsey
2017-2018 Madison County School District, Ridgeland, MS 2017-2018 Roseville Joint Union High School District, CA 2017-2018 Mabton School District, WA 2017-2018 Saugus Union School District, Santa Carlita, CA 2017-2018 Denair Unified School District, Santa Carlita, CA 2017-2018 Reynolds School District, CA 2017-2018 Soap Lake School District, Fairview, OR 2017-2018 Soap Lake School District, WA 2017-2018 East End School District, WA 2017-2018 Gogden Community School District, IA 2017-2018 Webster City Community Schools, IA 2017-2018 Liberty Elementary School District, Buckeye AZ 2017-2018 South Central Nebraska Unified #5, Fairfield, NE 2017-2018 Ellensburg School District, WA 2017-2018 Ellensburg School District, WA 2017-2018 South Central Nebraska Unified #5, Fairfield, NE 2017-2018 Parlier Unified School District, CA 2016-2017 Cold Spring School District, Santa Barbara, CA 2016-2017 Carlsbad Municipal Schools, NM 2016-2017 School District of Fort Atkinson, WI 2016-2017 School District, MS 2016-2017 Richland School District, MS	2017-2018	Fort Sage Unified School District,	Dr. Christopher Bonn
Ridgeland, MS  Roseville Joint Union High School District, CA  2017-2018  Mabton School District, WA  2017-2018  Mabton School District, WA Mr. Joseph Castilleja Dr. Colleen Hawkins Santa Carlita, CA  2017-2018  Denair Unified School District, CA  2017-2018  Reynolds School District, Fairview, OR 2017-2018  Reynolds School District, Fairview, OR 2017-2018  Soap Lake School District, WA Ms. Darnella Pray Ms. Darnella Pray  Ms. D		Herlong, CA	-
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2016-2017 Richland School District, CA Dr. Dagoberto Garcia	2016-2017	Starkville Oktibbeha Consolidated	
2016-2017 Richland School District, CA Dr. Dagoberto Garcia		School District, MS	
2015-2016 Oxnard Union High School Dist., CA Ms. Penelope DeLeon	2016-2017	Richland School District, CA	Dr. Dagoberto Garcia
	2015-2016	Oxnard Union High School Dist., CA	Ms. Penelope DeLeon

2015-2016	Alisal Union School District, CA	Dr. Hector Rico
2015-2016	Johnstonville Elem. School Dist., CA	Dr. Melanie Spears
2015-2016	East Dubuque School District, IL	Mrs. Tori Lindeman
2015-2016	Hemet Unified School District, CA	Ms. Christi Barrett
2015-2016	Ottumwa CSD, IA	Ms. Nichole Koolker
2015-2016	Charlotte-Mecklenburg Schools, NC	Dr. Clayton Wilcox
2015-2016	Rapid City Area School District, SD	Dr. Lori Simon
2015-2016	Francis Howell School District	Dr. Mary Hendricks-Harris
	Saint Charles, MO	ž
2015-2016	Glendale Unified School District, CA	Mr. Winfred Roberson
2015-2016	Grand Island Public Schools, NE	Dr. Tawana Grover
2015-2016	Othello School District No. 147, WA	Dr. Kenneth Hurst
	,	
2014-2015	Penn Valley Union Elementary	Dr. Torie England
	School District, CA	2
2014-2015	Newcastle Elem. School District, CA	Ms. Denny Rush
2014-2015	Seattle Public Schools, WA	Ms. Ashley Davies
	(Director of Enrollment Planning)	ž
2014-2015	Caney Valley USD 436, KS	Mr. Blake Vargas
2014-2015	Birmingham City Schools, AL	Dr. Kelley Gacutan
2014-2015	Cherokee Community School Dist., IA	Ms. Kimberly Lingenfelter
2014-2015	Chief Leschi Schools, Puyallup, WA	Dr. Amy Eveskeige
2014-2015	Colts Neck Township Schools, NJ	Ms. Mary Jane Garibay
2014-2015	Conejo Valley Unified School District	Dr. Ann Bonitatibus
	Thousand Oaks, CA	
2014-2015	El Monte Union High School Dist., CA	Dr. Irella Perez
2014-2015	Gustine Unified School District, CA	Mr. William Morones
2014-2015	Hot Springs School District, AR	Mr. Mike Hernandez
2014-2015	San Juan Island School District	Dr. Danna Diaz
	Friday Harbor, WA	
2014-2015	Sunnyside Unified School District	Mr. Steven Holmes
	Tucson, AZ	
2014-2015	Unity Charter School, Morristown, NJ	Ms. Connie Sanchez
2014-2015	Watson Chapel School District	Dr. Connie Hathorn
	Pine Bluff, AR	
2013-2014	Arkansas Arts Academy(Benton	Mrs. Mary Ley
	County School of Arts), AR	
2013-2014	Caddo Parish Public Schools	Dr. Theodis Lamar Goree
	Shreveport, LA	
2013-2014	Fallbrook Union High School	Dr. Hugo Pedroza
	District, CA	<u> </u>
2013-2014	Gardner Public Schools, MA	Ms. Denise Clemons
2013-2014	Hermitage School District, AR	Dr. Tracy Tucker
2013-2014	Mary M. Knight School Dist., WA	Dr. Ellen Perconti
2013-2014	Winship-Robbins Elem. Schools, CA	Dr. Laurie Goodman
2013-2014	Valley Springs School Dist., AR	Ms. Judy Green
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#### McPherson & Jacobson, L.L.C. Consultants

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

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

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

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

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

#### **Alabama Consultants**

Dr. Barry Carroll Educational Consultant Athens, Alabama

Dr. Paul McKendrick Retired Superintendent Tuscaloosa, Alabama

#### Alaska Consultants

Mr. Harry Rogers Retired Superintendent Petersburg, Alaska

#### **Arizona Consultants**

Dr. William Dean Retired Superintendent Tucson, Arizona

Ms. Barbara Dean Retired from AASA Tucson, Arizona

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

Dr. Les Huth Retired Professor Scottsdale, Arizona

Mr. Lawrence Mason Retired Superintendent Gold Canyon, Arizona Ms. Jennifer Tanner Board Member El Mirage, Arizona

#### **Arkansas Consultants**

Mr. Wayne Gibson Board Member El Dorado. Arkansas

Dr. Diana Julian Professor Benton, Arkansas

Mr. Terry Julian Retired Administrator Benton, Arkansas

Mr. Bobby Lester Retired Superintendent Jacksonville, Arkansas

Dr. John H. Moore Retired Superintendent Magnolia, Arkansas

Dr. Tony Thurman Superintendent Cabot, Arkansas

Mr. Andrew Tolbert Retired Superintendent Warren, Arkansas

Mr. Mitch Walton Professor Searcy, Arkansas

Mr. Jerrod Williams Superintendent Bauxite, Arkansas

Dr. Kieth Williams Retired Superintendent Bald Knob, Arkansas

#### **California Consultants**

Mrs. Janice Adams Retired Superintendent Benicia, California

Mr. Edward Agundez Retired Superintendent Nuevo, California

Mrs. Nicole Anderson Educational Consultant Vallejo, California

Ms. Aida Buelna Retired Superintendent Woodland, California

Mr. Robert Challinor Retired Superintendent Victorville, California

Mr. Julian Diaz Retired Superintendent Oroville, California

Mr. Robert Ferguson Retired Superintendent Napa, California

Mr. William Huyett Retired Superintendent Lodi, California

Mr. Benjamin Johnson II Board Member Riverside, California

Dr. Barry Kayrell Retired Superintendent Murrieta, California

Dr. Steven Lowder Retired Superintendent Stockton, California

Dr. Michael McCoy Superintendent Bakersfield, California

Mr. Dennis Murray Retired Superintendent Murrieta, California

Dr. Marilyn Shepherd Retired Superintendent Friant, California

Dr. John Sugiyama Retired Superintendent Indio, California Mr. Edward Velasquez Retired Superintendent Chino. California

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

#### **Colorado Consultants**

Ms. Peg Portscheller Educational Consultant Parachute. Colorado

Dr. Norman Ridder Retired Superintendent Arvada, Colorado

#### Florida Consultants

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

#### **Idaho Consultants**

Dr. William Dean Retired Superintendent Post Falls, Idaho

Ms. Barbara Dean Retired from AASA Post Falls, Idaho

Mr. Don Hague Consultant Emeritus Retired Superintendent Sandpoint, Idaho

Mr. Edward Velasquez Retired Superintendent Hayden, Idaho

#### **Illinois Consultants**

Dr. John Closen Professor Western Illinois University Peoria, Illinois

Dr. Lloyd Kilmer Retired Professor Moline, Illinois

#### **Iowa Consultants**

Ms. Kimberly Antisdel Retired Administrator Grimes, Iowa Mr. Dennis Bahr Retired Superintendent Webster City, Iowa

Mr. Michael Billings Retired Superintendent Story City, Iowa

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

Dr. Lloyd Kilmer Retired Professor Davenport, Iowa

Mr. Gary McAndrew Former Board Member Peosta, Iowa

Mr. Lyle Schwartz Retired Superintendent Story City, Iowa

Dr. Richard Sundblad Consultant Emeritus Urbandale, Iowa

Dr. Michael Teigland Retired Superintendent Indianola, Iowa

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

Dr. Steve Williams Consultant Emeritus Monticello, Iowa

#### Kansas Consultants

Dr. Brad Rahe Retired Superintendent Mulvane, Kansas

Mr. Dennis Burke Retired Superintendent Baxter Springs, Kansas

Dr. James Christman Retired Professor Pittsburg, Kansas

Dr. Justin Henry Superintendent Goddard. Kansas

Mr. Von Lauer Retired Superintendent Sabetha, Kansas Dr. Bradley Rahe Retired Superintendent Holton, Kansas

Mr. Howard Shuler Consultant Emeritus Topeka, Kansas

#### **Louisiana Consultants**

Ms. Janet Dixon Board Member Alexandria, Louisiana

Ms. Lorethie Dunn Former Board Member Bastrop, Louisiana

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

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

Mrs. Janet Pope LSBA Staff Member Lafayette, Louisiana

Mr. John Smith Board Member St. Rose, Louisiana

#### **Michigan Consultants**

Mr. Lawrence Mason Retired Superintendent Spring Lake, Michigan

#### **Minnesota Consultants**

Dr. Leslie Huth Professor Emeritus Oak Park Heights, Minnesota

Ms. Pamela Lindberg School Board Director New Hope, Minnesota

Dr. Linda Madsen Retired Superintendent Forest Lake, Minnesota

Dr. Gary Schnellert Retired Professor Sartell, Minnesota

#### Mississippi Consultants

Dr. Tom Clark Retired Superintendent Petal, Mississippi

Dr. James Hutto Retired Superintendent Petal, Mississippi

Mr. Ronald Walker Retired Superintendent Hattiesburg, Mississippi

#### Missouri Consultants

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

Mr. Destry Brown Superintendent Clinton, Missouri

Dr. James Christman Retired Professor Carl Junction, Missouri

Dr. Dennis Cooper Retired Superintendent Springfield, Missouri

Ms. Renee Goostree Professor Pittsburg State University Joplin, Missouri

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

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

#### **Montana Consultants**

Dr. Michael McLaughlin Educational Consultant Butte, Montana

#### **Nebraska Consultants**

Dr. Mike Cunning Retired Superintendent Hershey, Nebraska

Mr. Alan Ehlers Superintendent Madison, Nebraska Dr. Jerry Ehlers Retired Superintendent Ainsworth, Nebraska

Dr. Randall Gilson Superintendent South Central Nebraska Unified 5 Clay Center, Nebraska

Dr. Derrick Joel Superintendent Raymond, Nebraska

Dr. Mike Lucas Superintendent York, Nebraska

Mrs. Jane McDaniel Former Board Member Plattsmouth, Nebraska

Mr. Glen Morgan Retired Superintendent Fremont, Nebraska

Mr. Pat Nauroth Superintendent Beatrice, Nebraska

Dr. Randy Nelson Consultant Emeritus Retired Superintendent Seward, Nebraska

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

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

Dr. Rob Winter Retired Superintendent Grand Island, Nebraska

#### **New Jersey Consultants**

Dr. Candis Finan Retired Superintendent Summit, New Jersey

#### **New Mexico Consultants**

Mr. Vernon Asbill Retired Superintendent Artesian, New Mexico

#### **New York Consultants**

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

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

#### **North Dakota Consultants**

Mr. Robert Marthaller Retired Superintendent Bismarck, North Dakota

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

#### **Ohio Consultants**

Dr. Renee Willis Superintendent, Richmond Heights Willoughby Hills

#### Oklahoma Consultants

Dr. Robert Neel Retired Superintendent Norman, Oklahoma

#### **Oregon Consultants**

Dr. Robert Clark Superintendent Milton-Freewater, Oregon

#### Pennsylvania Consultants

Dr. Marjorie Alexander Wallace Retired IU Director Waterford, Pennsylvania

Dr. Candis Finan Retired Superintendent Matamoras, Pennsylvania

#### **South Dakota Consultants**

Mr. Jack Broome Retired Superintendent Burke, South Dakota

Dr. Henry Kosters Retired ASBSD Asst. Executive Director Pierre, South Dakota Dr. Robert Mayer Retired Professor Sioux Falls. South Dakota

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

#### **Texas Consultants**

Dr. Donald Mathis Educational Consultant Cypress, Texas

#### Virginia Consultants

Dr. John Gratto Professor Virginia Tech Blacksburg, Virginia

#### **Washington Consultants**

Dr. Steven Lowder Retired Superintendent Vancouver, Washington

Dr. Nathan McCann Superintendent Ridgefield, Washington

Mr. Michael Parker Retired Superintendent Orondo, Washington

Mr. Richard Parker Former Board Member Mukilteo, Washington

Mr. Richard Stewart Superintendent Ferndale, Washington

#### **Wisconsin Consultants**

Dr. Brian Busler Superintendent Oregon, Wisconsin

Dr. Brian Hanes Superintendent Ashwaubenon, Wisconsin

Mr. Damian La Croix Superintendent Suamico, Wisconsin

Dr. Dennis Pauli Superintendent Edgerton, Wisconsin Dr. Melissa Thompson Superintendent Swallow School District Hartland, Wisconsin

#### **Wyoming Consultants**

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

Dr. Chuck Grove Retired Superintendent Pinedale, Wyoming

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

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

<u>Alaska</u>	<u>nrollment</u>
Valdez City Schools, Valdez (2017/18)	650
Arkansas	
Van Buren School District, Van Buren (2014/15)	5,900
Marion School District, Marion (2016/17)	4,113
Jacksonville-North Pulaski School District, Jacksonville (2014/15)	4,000
Pine Bluff School District, Pine Bluff (2015/16)	4,000
Hot Springs School District, Hot Springs (2014/15)	3,689
Batesville School District, Batesville (2016/17)	3,372
Vilonia Public Schools, Vilonia (2013/14)	3,000
Harrison School District, Harrison (2016/17)	2,800
Watson Chapel School District, Pine Bluff (2014/15)	2,721
Berryville School District, Berryville (2013/14)	1,925
Star City School District, Star City (2015/16)	1,645
Highland School District, Hardy (2016/17)	1,571
DeWitt School District, DeWitt (2017/18)	1,335
Fountain Lake School District, Hot Springs (2015/16)	1,300
Harrisburg School District, Harrisburg (2017/18)	1,300
McGehee Public Schools, McGehee (2016/17)	1,186
Valley Springs School District, Valley Springs (2013/14)	934
Arkansas Arts Academy (formerly Benton County School of the Arts),	
Rogers (2013/14)	780
East End School District, Bigelow (2017/18)	650
East End School District, Bigelow (2014/15)	622
Junction City School District, Junction City (2013/14)	600
Magazine School District, Magazine (2014/15)	520
Foreman School District, Foreman (2017/18)	509
Midland School District, Pleasant Plains (2013/14)	500
Hermitage School District, Hermitage (2013/14)	430
Arizona	
Tucson Unified School DistrictGeneral Counsel, Tucson (2015/16)	48,000
Tucson Unified School DistrictInternal Auditor Position, Tucson (2016/17)	48,000
Peoria Unified School District #11, Glendale (2017/18)	37,000
Dysart Unified School District, Surprise (2017/18)	25,000
Kyrene Elementary School District No. 28, Tempe (2015/16)	18,000
Sunnyside Unified School District No. 12, Tucson (2014/15)	17,400
Liberty Elementary School District, Buckeye (2017/18)	3,500
Tucson Unified School DistrictTucson High Magnet School Principal, (2013/14)	3,000
Salt River Schools, Scottsdale (2017/18)	1,000

<u>California</u> <u>Enr</u>	ollment
Elk Grove Unified School District, Elk Grove (2014/15)	62,000
Glendale Unified School District, Glendale (2015/16)	26,200
Hemet Unified School District, Hemet (2015/16)	21,000
Conejo Valley Unified School District, Thousand Oaks (2014/15)	19,500
Ventura Unified School District, Ventura (2016/17)	17,000
New Haven Unified School District, Union City (2016/17)	12,148
Roseville Joint Union High School District, Roseville (2017/18)	10,300
Berkeley Unified School DistrictExecutive Director for Special Education (2017/18)	10,000
Saugus Union School District, Santa Clarita (2017/18)	10,000
El Monte Union High School District, El Monte (2014/15)	9,500
Alisal Union School District, Salinas (2015/16)	9,000
Calexico Unified School District, Calexico (2017/18)	8,966
Paso Robles Joint Unified School District, Paso Robles (2013/14)	6,500
Benicia Unified School District, Benicia (2014/15)	5,000
Soledad Unified School District, Soledad (2016/17)	4,870
Richland School District, Shafter (2016/17)	3,504
Parlier Unified School District, Parlier (2017/18)	3,435
Fallbrook Union High School District, Fallbrook (2013/14)	2,600
Nevada Joint Union High School District, Grass Valley (2017/18)	2,600
Golden Valley Unified School District, Madera (2017/18)	1,950
Alpine Union School District, Alpine (2015/16)	1,700
Old Adobe Union School District, Petaluma (2013/14)	1,700
Red Bluff Joint Union High School District, Red Bluff (2013/14)	1,622
Academy of Arts & SciencesCEO Search, Thousand Oaks (2015/16)	1,600
Denair Unified School District, Denair (2017/18)	1,500
Lakeside Union School District, Bakersfield (2014/15)	1,310
Sonora Union High School District, Sonora (2017/18)	1,000
Pollock Pines Elementary School District, Pollock Pines (2015/16)	800
Newcastle Elementary School District, Newcastle (2014/15)	796
Penn Valley Union Elementary School District, Penn Valley (2014/15)	700
Sausalito Marin City School District, Marin City (2015/16)	524
Fort Sage Unified School District, Herlong (2016/17)	310
Johnstonville Elementary School District, Susanville (2016/17)	212
Winship-Robbins Elementary School District, Meridian (2013/14)	200
Cold Spring School District, Santa Barbara (2016/17)	175
Colorado Thompson School District D2 L Leveland (2017/19)	16 000
Thompson School District R2-J, Loveland (2017/18)  Morgan County School District Fort Morgan (2017/18)	16,000
Morgan County School District, Fort Morgan (2017/18)	3,300

<u>Iowa</u>	nrollment
Marshalltown Community School District, Marshalltown (2015/16)	5,085
Ottumwa Community School District, Ottumwa (2015/16)	4,595
Western Dubuque Community School District, Farley (2014/15)	2,991
Webster City Community Schools, Webster City (2017/18)	1,800
Center Point-Urbana Community School District, Center Point (2015/16)	1,543
West Liberty Community School District, West Liberty (2016/17)	1,307
Cedar Rapids Community School District, Cedar Rapids (2016/17)	1,300
Clear Lake Community School District, Clear Lake (2015/16)	1,200
Saydel Community School District, Des Moines (2013/14)	1,200
PCM Community School District, Monroe (2014/15)	1,100
Monticello Community School District, Monticello (2015/16)	1,096
Cherokee Community School District, Cherokee (2014/15)	940
West Branch Community School District, West Branch (2017/18)	844
Belmond-Klemme Community School District, Belmond (2015/16)	801
MMCRU Schools (Marcus Meridian Cleghorn Remsen Union), Marcus (2017/18)	800
North Cedar Community School District, Stanwood (2015/16)	800
Colfax-Mingo School District, Colfax (2014/15)	746
North Kossuth CSD & North Union CSD (shared supt), Swea City/Armstrong (201	
North Butler Community Schools, Allison (2013/14)	707
Ogden Community School District, Ogden (2017/18)	700
AGWSR Community School District, Ackley (2017/18)	624
AGWSR Community School District, Ackley (2013/14)	600
PCM Community School DistrictPrincpal Search, Monroe (2014/15)	
<u>Idaho</u>	
Coeur d'Alene Public Schools, Coeur d'Alene (2016/17)	11,000
<u>Illinois</u>	<b>5</b> 10
East Dubuque School District #119, East Dubuque (2017/18)	718
Scales Mound Community Unit School District #211, Scales Mound (2014/15)	245
<u>Kansas</u>	
Kansas State Department of EducationCommissioner of Education, Topeka (2013	
Lawrence Public Schools USD 497, Lawrence (2015/16)	11,716
Lansing Unified School District 469, Lansing (2015/16)	2,600
Ottawa USD 290, Ottawa (2017/18)	2,386
Independence USD #446, Independence (2014/15)	2,000
Chapman USD 473, Chapman (2015/16)	1,065
Burlington USD 244, Burlington (2015/16)	854
Caney Valley USD #436, Caney (2014/15)	810
Wellsville USD 289, Wellsville (2017/18)	782 400
Lyndon USD 421, Lyndon (2016/17)  Payling County Schools USD 105, Atwood (2012/14)	400
Rawlins County Schools USD 105, Atwood (2013/14) Stofford USD 340, Stofford (2016/17)	317
Stafford USD 349, Stafford (2016/17)	200

<u>Louisiana</u> Caddo Parish Public Schools, Shreveport (2013/14)	<u>Enrollment</u> 41,000
Massachusetts Gardner Public Schools, Gardner (2013/14)	2,528
<u>Missouri</u> Francis Howell School District, Saint Charles (2015/16) Webster Groves School District, Webster Groves (2015/16) Willard Public Schools, Willard (2016/17)	17,000 4,500 4,500
Mississippi Jackson Public Schools, Jackson (2017/18) Madison County School District, Ridgeland (2017/18) Starkville Oktibbeha Consolidated School District, Starkville (2016/17)	27,062 13,225 5,200
Montana Shepherd School District #37, Shepherd (2016/17)	750
North Carolina Charlotte-Mecklenburg Schools, Charlotte (2015/16) Dare County Schools, Nags Head (2016/17)	145,363 5,500
Nebraska Learning Community of Douglas and Sarpy Counties, Omaha (2015/16) Grand Island Public Schools, Grand Island (2015/16) Waverly School District 145, Waverly (2016/17) Crete Public Schools, Crete (2015/16) Seward Public Schools, Seward (2016/17) Fairbury Public Schools, Fairbury (2014/15) Broken Bow Public Schools, Broken Bow (2014/15) Central City Public Schools, Central City (2013/14) South Central Nebraska Unified #5, Fairfield (2017/18) Chase County Schools, Imperial (2017/18) Gibbon Public Schools, Gibbon (2016/17) Wood River Rural Schools, Wood River (2013/14) Bridgeport Public Schools, Bridgeport (2013/14) Centura Public Schools, Cairo (2017/18) Twin River Public Schools, Genoa (2013/14) Yutan Public Schools, Yutan (2014/15) Donpihan-Trumbull Public School, Doniphan (2017/18) Superior Public Schools, Wymore (2016/17) Pawnee City Public Schools, Pawnee City (2015/16) Axtell Community School, Axtell (2016/17) Creek Valley Public Schools, Daykin (2013/14) Meridian Public Schools, Daykin (2013/14)	9,607 1,920 1,800 1,406 901 810 690 681 620 598 549 500 486 480 477 465 435 395 297 264 252 200

New Jersey Colts Neck Township Schools, Colts Neck (2014/15) Harding Township School, New Vernon (2014/15) Unity Charter SchoolDirector of Schools, Morristown (2014/15)	Enrollment 969 330 205
NM Carlsbad Municipal Schools, Carlsbad (2016/17)	6,410
<u>Oregon</u> Bend-La Pine Schools, Bend (2014/15) Reynolds School District, Fairview (2017/18)	17,300 11,200
<u>Pennsylvania</u> Bishop McCort Catholic High SchoolPrincipal, Johnstown (2013/14)	400
South Carolina Jasper County School District, Ridgeland (2015/16)	3,000
South Dakota Rapid City Area School District 51-4, Rapid City (2015/16) Meade School District, Sturgis (2017/18) Sisseton School District 54-2, Sisseton (2016/17)	13,320 2,800 925
Virginia VA Culpeper County Public Schools, Culpeper (2014/15)	8,001
Washington WSSDAExecutive Director, Olympia (2015/16) Seattle Public SchoolsDirector of Enrollment Planning, Seattle (2014/15) Bellevue School DistrictExec. Dir of Human Resources, Bellevue (2013/14) Battle Ground School District, Battle Ground/Brush Prairie (2013/14) Tahoma School District No. 409, Maple Valley (2017/18) Tumwater School District, Tumwater (2014/15) Longview School District, No. 122, Longview (2014/15) Kelso School District, Kelso (2013/14) Shelton School District, Kelso (2013/14) Shelton School District No. 147, Othello (2015/16) Centralia School District #401, Centralia (2013/14) Ellensburg School District #401, Ellensburg (2017/18) Ridgefield School District, Ridgefield (2013/14) Port Townsend School District, Port Townsend (2015/16) Tonasket School District, Tonasket (2014/15) Tenino School District, Tenino (2013/14) Chimacum School District, Chimacum (2014/15) Okanogan School District, Okanogan (2017/18) Mabton School District, Mabton (2017/18) Coupeville School District, Coupeville (2017/18) Kalama Schools, Kalama (2014/15) Chief Leschi Schools, Puyallup (2014/15)	52,999 19,000 13,000 8,200 6,700 6,320 4,500 4,115 4,000 3,522 3,300 2,200 1,214 1,200 1,180 1,100 1,000 980 950 890

Washington (continued)	Enrollment
Chewelah School District, Chewelah (2017/18)	815
San Juan Island School District, Friday Harbor (2014/15)	750
Quilcene School District, Quilcene (2017/18)	650
Kittitas School District, Kittitas (2016/17)	600
Ocosta School District, Westport (2016/17)	600
Mossyrock School District, Mossyrock (2015/16)	530
Soap Lake School District #156, Soap Lake (2017/18)	490
Kittitas School DistrictSecondary Principal, Kittitas (2014/15)	350
McCleary School District, McCleary (2017/18)	325
Morton School District No. 214, Morton (2013/14)	310
McCleary School District (grades PreK-8), McCleary (2014/15)	290
Crescent School District, Joyce (2015/16)	250
Kittitas School DistrictElementary Principal, Kittitas (2014/15)	250
Mary M Knight School District #311, Elma (2013/14)	195
Thorp School District, Thorp (2017/18)	170
Wishkah Valley School District, Aberdeen (2014/15)	140
Skykomish School District, Skykomish (2015/16)	45
Wisconsin	
West Bend School District, West Bend (2017/18)	6,909
DeForest Area School District, DeForest (2015/16)	3,625
School District of Fort Atkinson, Fort Atkinson (2016/17)	2,900
Clinton Community School District, Clinton (2014/15)	1,101
Bristol School District No. 1, Bristol (2015/16)	770

# A Proposal for the Selection of a Superintendent

Presented To:



Submitted By:

Ray and Associates, Inc.

CORPORATE OFFICE
901 17<sup>TH</sup> STREET NE
CEDAR RAPIDS, IOWA 52402
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Finding Leaders for America's Schools

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## Ray and Associates, Inc.

September 24, 2018

Lebanon Community Schools ATTN: Mr. Tom Oliver, Board Chair 485 South 5<sup>th</sup> Street Lebanon, OR 97355

Dear Mr. Oliver and Members of the School Board:

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

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

We are familiar with Oregon as we are currently conducting the Superintendent search for the Lake Oswego School District and previously conducted Superintendent searches for Gresham-Barlow School District, Salem-Keizer Public Schools, Eugene School District 4J, Hood River County School District and Medford School District 549C, Oregon. In the Western region we previously assisted Snoqualmie Valley School District, Lake Washington School District, Seattle Public Schools, Mercer Island School District, Bellevue School District, Northshore School District, Kent School District and Federal Way Public Schools, Washington; Clark County School District, Nevada; Los Alamos Public Schools, Albuquerque Public Schools, Santa Fe Public Schools and Roswell Independent School District, New Mexico; Deer Valley Unified School District, Roosevelt Elementary School District, Gilbert Public Schools, Paradise Valley Unified School District, Camelback Desert Sands, Tempe Union High School District and Cartwright Elementary School District, Arizona; Palos Verdes Unified School District, Poway Unified School District, San Ysidro School District, Albany USD, Berkeley USD, Pasadena USD and Emery USD, California; Blaine County School District, Idaho; Hawaii School of Deaf and Blind, Hawaii; Sheridan School District, Jeffco Public Schools, Flagstaff Academy and Eagle County Schools, Colorado.

Nationally we have assisted Waterbury Public Schools, Greenwich Public Schools, Bridgeport Public Schools, Hartford City Public Schools and the Consolidated School District of New Britain, Connecticut; Wyandanch Union Free School District and Amityville Union Free School District, New York; Anne Arundel County Public Schools, Howard County Public School System, Wicomico County Public Schools and Prince George's County Public Schools, Maryland; Woodland Hills School District, Lewisburg Area School District, Wissahickon School District, Millville School District, Montgomery County Intermediate Unit and Benton

Area Public School District, Pennsylvania; Teaneck Public Schools, Paterson Public Schools, Trenton Public Schools, East Orange School District, Camden City Public Schools and Marlboro Township Public Schools, New Jersey; Dover School District, New Hampshire; Lynchburg City Schools, Montgomery County Public Schools, Mecklenburg County Schools, Bedford County Schools, Newport News Public Schools, Hampton City Schools, Prince William County Public Schools and Williamsburg-James City Schools, Virginia; Savannah-Chatham County Public School System, Georgia; Maury County Public Schools, Knox County Schools, Oak Ridge Schools and Sumner County Schools, Tennessee; Pulaski County Special School District, Rogers Public Schools, Cotter Public Schools, Mountain Home Public Schools and Fayetteville Public Schools, Arkansas; The School District of Palm Beach County, Florida State University Schools, Brevard Public Schools and Collier County Public Schools, Florida; Austin ISD, Plano ISD, Lewisville ISD, Fort Worth ISD, Killeen, ISD and Socorro ISD, Texas; Beaufort County School District, Jasper County School District and Richland County School District One, South Carolina; Cincinnati Public Schools and Lorain City Schools, Ohio; Lakeville Area School District, Minnesota; Williston Public School District 1, Dickinson Public Schools and Fargo Public Schools, North Dakota; Vermillion School District, South Dakota; Detroit Public Schools Community District, Ecorse Public Schools, Benton Harbor Area Schools and Ann Arbor Public Schools, Michigan; Kansas City Kansas Public Schools, Shawnee Mission School District, Lawrence Public Schools, Kansas; Joplin Schools and Kansas City Public Schools, Missouri; and Glenbrook North and Glenbrook South High Schools, Joliet School District and Township School District #113, Illinois.

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

We are currently assisting Lake Oswego School District, Oregon; Westside Community Schools, Nebraska; Rock Island-Milan School District #41 and Hazel Crest School District 152½, Illinois; Geary County Schools USD 475, Kansas; and many others across the nation.

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

Our firm has exhibited at the National School Boards Association (NSBA), National Association of Secondary School Principals (NASSP), the American Association of School Administrators (AASA), the Association of Latino Administrators and Superintendents (ALAS) and the National Alliance of Black School Educators (NABSE), as well as other professional organizations, for over forty (40) years. This year the firm exhibited and presented at numerous state school board associations. Exhibiting and presenting at these state and national organizations allows the firm to meet and recruit outstanding administrators for our clients.

It is our goal to make the selection process professional, efficient and successful to assure your complete satisfaction with our services. It is quite common for a Board to be concerned about the quality of candidates who might be available in today's job market. Outstanding administrators will need to be

recruited regardless of the time of year or the position needing to be filled because many of these school leaders already have good jobs. We feel that our firm can be very successful in attracting candidates that will meet or exceed your expectations. With a consulting firm of over one hundred sixty (160) associates located nationwide, Ray and Associates, Inc. has been able to develop the most comprehensive pool of candidates of any executive search firm in the country. Our reputation for success is built upon providing school districts precisely the type of candidate that satisfies not only the Board but the community and faculty as well.

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

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

Sincerely,

Ryan M. Ray President

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# INTRODUCTION

#### THE SEARCH

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





# **BRIEF OVERVIEW**

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

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

# **PERFORMANCE**

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

#### MISSION STATEMENT

Ray and Associates, Inc.

Leaders in Executive Searches

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

# HISTORY AND OVERVIEW OF THE ORGANIZATION

# **PROFILE OF THE FIRM**

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

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

In addition to our corporate office located in Cedar Rapids, Iowa, we have a National Executive Director, eight (8) Regional Search Directors and over one hundred sixty (160) Associates located throughout the country. Therefore, distance is not a factor to our firm when meeting with our clients.

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

Our firm has exhibited at the National School Boards Association (NSBA), National Association of Secondary School Principals (NASSP), the American Association of School Administrators (AASA), the Association of Latino Administrators and Superintendents (ALAS) and the National Alliance of Black School Educators (NABSE), as well as other professional organizations, for over forty (40) years. This year the firm exhibited and presented at numerous state school board associations. Exhibiting and presenting at these state and national organizations allows the firm to meet and recruit outstanding administrators for our clients. We also have associates who are affiliated with the Council of Great City Schools, Urban Superintendents Association of America, the Association of Latino Administrators and Superintendents (ALAS), National Alliance of Black School Educators (NABSE), as well as other professional organizations.

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

It is only a matter of reality that outstanding administrators already have good jobs and need to be recruited. We are familiar with Oregon as we are currently conducting the Superintendent search for the Lake Oswego School District and previously conducted Superintendent searches for Gresham-Barlow School District, Salem-Keizer Public Schools, Eugene School District 4J, Hood River County School District and Medford School District 549C, Oregon. In the Western region we previously assisted Snoqualmie Valley School District, Lake Washington School District, Seattle Public Schools, Mercer Island School District, Bellevue School District, Northshore School District, Kent School District and Federal Way Public Schools, Washington; Clark County School District, Nevada; Los Alamos Public Schools, Albuquerque Public Schools, Santa Fe Public Schools and Roswell Independent School District, New Mexico; Deer Valley Unified School District, Roosevelt Elementary School District, Gilbert Public Schools, Paradise Valley Unified School District, Camelback Desert Sands, Tempe Union High School District and Cartwright Elementary School District, Arizona; Palos Verdes Unified School District, Poway Unified School District, San Ysidro School District, Albany USD, Berkeley USD, Pasadena USD and Emery USD, California; Blaine County School District, Idaho; Hawaii School of Deaf and Blind, Hawaii; Sheridan School District No. 2., Colorado Springs School District 11, Boulder Valley School District, Douglas County School District, Jeffco Public Schools, Flagstaff Academy and Eagle County Schools, Colorado. Our network and recruiting efforts are second to none. We bring a wealth of experience and knowledge to your District focused upon our goal to make the selection process professional, efficient and successful so we can state, without reservation, that you will be quite pleased with our services.



#### THE TEAM

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

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

#### KEY ASSOCIATES FOR THE PROJECT

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

#### Mr. Ryan M. Ray, President

President/Cedar Rapids, IA

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

#### **Dr. Bill Newman**

National Executive Director/Mountain Home, AR

Bill serves our firm as the National Executive Director and assists the president with all aspects of our executive searches. He also assigns all background investigative work on candidates and supervises the teams work. He has an earned Ph.D., is a former Superintendent of schools and is a retired military veteran.

#### **Dr. James Hager**

Regional Search Associate/Renton, WA

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

#### **Dr. Tony Apostle**

Regional Search Director/Fox Island, WA

Tony serves our firm as a Regional Search Director and will monitor and direct search team efforts as well as recruiting and screening candidates. Dr. Apostle graduated from the University of Washington with a Bachelor's degree in English/Political Science and from Washington State University he earned a Master's degree in Educational Administration and a Doctorate degree in Elementary/Secondary Education. Tony served as an educator in Washington for over 30+ years serving as an English Teacher, Principal, Director and Superintendent.

# **SUMMARY OF PROJECT ASSOCIATES**

Dr. Roy Brooks Little Rock, AR

Mr. Rick Mills Chicago, IL

**Dr. Richard Christie Council Bluffs, IA** 

Mr. Ricardo Medina Bridgeport, MI

Dr. Mary Fasbender St. Charles, IL

Mr. Don Long Hendersonville, TN

Dr. Paige Fenton-Hughes Douglas, WY

Dr. Carl Davis
Powder Springs, GA

Dr. Jim Hager Renton, WA

Mr. Alvin Johnson Sandy Springs, GA

Dr. Bob Mata Cathedral City, CA

**Dr. Lane Plugge Council Bluffs, IA** 

Mr. Dale Caldwell New Brunswick, NJ

Dr. Gloria Davis Chicago, IL

**Dr. James Davis Plano, TX** 

Dr. Brenda Dietrich Topeka, KS

Mr. Dale Monroe Marion, IA

Ms. Sandi Gero Rock Hill, SC

Mr. Robert Alfaro Hutto, TX

Dr. Bob Hammon Sycamore, IL

Dr. Michael Rush Lakewood, NJ

**Dr. Tom Williams Scottsdale, AZ** 

Ms. Linda Brock Packwood, IA

Dr. Karen Stinson Platteville, WI

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

# **SECTION I**

# CONSULTANT SERVICES PROVIDED FOR LEBANON COMMUNITY SCHOOLS THE CONSULTANT WILL:

#### STAGE 1 - BOARD INPUT AND PREPARATION

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

#### STAGE 2 - PROFILE DEVELOPMENT AND PROCESS

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

#### STAGE 3 - RECRUITING AND SCREENING

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

#### STAGE 3 - RECRUITING AND SCREENING — CONTINUED

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

#### **STAGE 4 - CANDIDATE PRESENTATION**

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

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

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

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

# WORKING WITH BOARD THROUGH EACH STAGE OF SEARCH

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

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

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

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

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

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

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

# **LEBANON COMMUNITY SCHOOLS**

## SUPERINTENDENT SEARCH SUGGESTED PROCESS AND TIMELINE

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

#### **DATE**

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

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

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

#### BUILDING THE PROFILE

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

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

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

# **INTERVIEW PROCESS – COMMUNITY INPUT**

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

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

# RECRUITMENT

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

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

- Largest recruiting network in the country
- Inform the firm's 160 associates of the position and seek recommendations
- Advertise in local, regional and national venues known for high readership by school leaders
- Consult our extensive database for precise matches between District and candidate profiles
- Aggressively recruit successful school leaders who are not currently seeking a new position to invite them to consider the position at Lebanon Community Schools
- Contact other organizations at state, regional and national levels regarding the position
- Proactively seek out potential candidates at state and national conventions



# SCREENING, REFERENCE CHECKS, INTERVIEWS AND FINAL **SELECTION**

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

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

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

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



# **SECTION II**

# **MONITORING THE SEARCH PROCESS - CLIENT CHECKPOINTS**

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

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



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

# **SECTION III**

## SEARCH COST – THE COMPLETE PROCESS

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

#### **COST BREAKDOWN**

**The Consultant Fee.** The base fee for the performance of the Superintendent search by the consultant as provided in this Proposal will be seventeen thousand dollars (\$17,000.00). If the Board selects only certain elements offered in this package, or requests services not included in this package, our fees and reimbursed expenses will be adjusted accordingly. The firm will discuss any modifications relating to the search fee regarding our services at the formal presentation. The Superintendent search fee shall be paid in three (3) installments; 1/2 of total fee is due upon signing of the contract; 1/4 of fee is due at the time of the stakeholder meetings; and the final 1/4 of fee is due when the Superintendent is officially hired by the District.

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

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

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

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

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

# PERFORMANCE CONTRACT

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

# **ESTIMATED COST SHEET – PREPARED FOR: LEBANON COMMUNITY SCHOOLS**

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

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

#### **Travel**

Ground transportation (billed at \$0.545 per mile)	2,600.00
Hotel (if needed for stakeholder meetings)	500.00
Meals	250.00
** Travel Subtotal	3,350.00

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

Shipping:	(Federal Express to the District, materials to search coordinator, candidate information after the	
candidates have	been selected from the screening process)	00.00

All expenses are estimates, based on past experiences. Lebanon Community Schools will be billed for only the actual expenses incurred.

#### **Board Approved Advertising**

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

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

<sup>\*</sup>Does not include estimated advertising or candidate expenses for interviews.

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

# **SECTION IV GENERAL PROVISIONS**

#### CONFIDENTIALITY

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

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

# **FOLLOW-UP AFTER THE SEARCH:**

# **BOARD SELF-ASSESSMENT SURVEY FOCUS ON FUTURE PLANNING**

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

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

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

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

# SATISFACTION GUARANTEED

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

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

# **REFERENCES**

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

SCHOOL DISTRICT	LOCATION	CONTACT PERSON	TITLE OF CONTACT	PHONE NUMBERS/ E-MAIL
Woodland Hills School District	North Braddock, PA	Jamie Glasser	Board President	Cell: 412-874-0161 glasja@whsd.net
Tangipahoa Parish School System	Amite, LA	Therese Domiano	Board President	Cell: 985-974-2955
Lawrence Public Schools	Lawrence, KS	Shannon Kimball	Former Board President	Cell: 785-840-7722 skimball@usd497.org
Pittsburg Community Schools USD 250	Pittsburg, KS	Marlene Willis	Former Board President	Cell: 602-404-8835 mwillis@usd250.org
Savannah-Chatham County Public Schools	Savannah, GA	Mary Davis- Brown	Board Secretary	Work: 912-395-1014 Mary.Davis-Brown@sccpss.com
Trenton Public Schools	Trenton, NJ	Perry Lattiboudere	Attorney	Work: 973-735-2742 plattiboudere@asgllaw.com
Gresham Barlow School District	Gresham, OR	John Hartsock	Board Member	Cell: 503-780-4806 hartsock7@gresham.k12.or.us
Mercer Island School District	Mercer Island, WA	David D'Souza	Former Board Chair	Cell: 206-202-0894 david.dsouza@mercerislandschools.org
Durham Public Schools	Durham, NC	Minnie Forte- Brown	Board Member	Cell: 919-452-2177 minnie.forte-brown@dpsnc.net
Roosevelt Elementary School District	Phoenix, AZ	Jeff Gadd	Former Interim Chief Financial Officer	Work: 602-243-4843 jeff.gadd@rsd.k12.az.us
Council Bluffs Community School District	Council Bluffs, IA	Troy Arthur	Board President	Cell: 402-651-0956 Troyarthur4cb@gmail.com
Flagstaff Academy	Longmont, CO	Wayne Granger	Executive Director	Work: 303-651-7900 x 204 wgranger@flagstaffacademy.org
Poway Unified School District	San Diego, CA	Michelle O'Connor- Ratcliff	Former Board President	District: 858-521-2704 moconnorratcliff@powayusd.com
Bellevue School District	Bellevue, WA	Chris Marks	Former Board President	Cell: 425-941-9573
Howard-Winneshiek Community School District	Cresco, IA	Clint Farlinger	Business Manager/Board Secretary	Wk: 563-547-2762 cfarlinger@howard-winn.k12.ia.us
Olathe Public Schools	Olathe, KS	Rick Schier	Former Board President	Home: 913-530-3644 rickschierboe@gmail.com
Joplin Schools	Joplin, MO	Jeff Koch	Former Board President	Work: 417-529-1236 jeffrykoch@hotmail.com

Austin Independent School District	Austin, TX	Vince Torres	Former Board President	Cell: 512-784-0620 Wk: 512-414-2550 trustees@austinisd.org
Fort Worth Independent School District	Fort Worth, TX	Jacinto Ramos Jr.	Former Board President	Work: 817-814-1920 Jacinto.Ramos@fwisd.org
Northshore School District	Bothell, WA	Amy Cast	Former Board President	Cell: 206-601-7909 Sbdistrict5@nsd.org
Des Moines Public Schools	Des Moines, IA	Dick Murphy	Former Board President	Cell: 515-250-5567 Hm: 515-278-6048 rmurphyia@earthlink.net
Maury County Public Schools	Columbia, TN	Jim Morrison	Former Board President	Wk: 615-350-7637 Cell: 931-446-2438 jement@cpws.net
Brevard Public Schools	Viera, FL	Robert Jordan	Former Board Chairman	Cell: 321-698-7110 Work: 321-383-4813 Robert.Jordan@genesisvii.com
Collier County Public Schools	Naples, FL	Allun Hamblett	Former Deputy Chief Administrative Officer	Cell: 239-398-0761 ARHAssociates@comcast.net
Howard County Public School System	Ellicott City, MD	Brian Meshkin	Former Board Member	Cell: 949-812-0081 brian@brianmeshkin.com
Fargo Public Schools	Fargo, ND	Jim Johnson	Former Board President	Cell: 701-200-4794 Work: 701-232-7481 johnsji@fargo.k12.nd.us
Glen Ellyn School District 41	Glen Ellyn, IL	Erica Nelson	Former Board President	Work: 630-452-4349 npdnelson1@gmail.com
Green Bay Area Public Schools	Green Bay, WI	Jean Marsch	Former Board President	Cell: 920 883-9394 Hm: 920 336-6835 jean.marsch@gmail.com
Paradise Valley Unified School District	Phoenix, AZ	Anne Greenberg	Board Member	Cell: 602-751-6642 Hm: 602-493-6642 asgpvusdBoard@cox.net
Manheim Township School District	Lancaster, PA	Hannah Bartges	Former Board President	Hm: 717-569-4484 jonbartges428@comcast.net
Roosevelt Union Free School District	Roosevelt, NY	Dr. Gerald Lauber	Financial Rep to NY State Commissioner	Cell: 516-917-5131 drgerry@me.com
Willingboro Township Public Schools	Willingboro, NJ	Dennis Tunstall	Former Board President	Cell: 609-405-0242l Hm: 609-877-7056 dennis.tunstall@comcast.net Dtunstall@wboe.net
Sumner County Schools	Gallatin, TN	Don Long	Former Board President	Cell: 615-349-6768 Hm: 615-826-6173 donlong.hville@gmail.com

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

# ALL EXECUTIVE SEARCH FIRMS ARE NOT THE SAME!

Ray and Associates, Inc.

# THE CLEAR DIFFERENCE...

- ✓ We customize every search to meet the specific needs of our clients.
- ✓ We have the largest professional recruiting network in the country.
- ✓ We have a highly qualified, full-time staff that is readily accessible to respond to both clients and candidates.
- ✓ We maintain a large, prescreened database of traditional and non-traditional candidates from across the country.
- ✓ We aggressively recruit candidates who closely match the District profile.
- ✓ We provide an attractive, user-friendly and informative website that allows candidates to access application materials on-line.
- ✓ We receive more applications than any search firm in the nation.
- ✓ We interview each individual Board member in order for them to provide information and insight into the development of the profile characteristics for the position.
- ✓ We collect and organize community and staff input when desired by the Board and provide a report that is highly useful in establishing the position criteria. In addition, our firm offers an online survey in various languages and will provide a link to the survey to post on the District's website.
- ✓ We offer the option to have our office design and develop the promotional application and flyer for the position.
- We have the most complete and comprehensive investigative system to assure our clients of candidate quality.
- ✓ We have a unique and successful consensus building process for Boards who may be split on candidates or other issues.
- ✓ We have been highly successful in providing a large diverse pool of candidates in all of our searches.
- ✓ We provide an in-depth candidate video interview to the Board.
- ✓ We provide criminal, civil litigation, social security, motor vehicle record checks and verification of educational degrees for the top (2-3) candidates at no additional fee.
- ✓ We provide a two-year guarantee clause in our contract with our clients.
- ✓ We provide a service to our clients after the Superintendent is hired to ensure a smooth transition and to establish realistic expectations at the outset.