

Proposal to Conduct a Superintendent Search For

Saugus Union School District



Saugus Union School District

January 16, 2018





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January 16, 2018

Christopher Trunkey
Board President
Saugus Union School District
24930 Avenue Stanford
Santa Clarita, CA 91355

Dear President Trunkey and Saugus Union School District Board of Trustees:

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

Our firm has worked with a wide variety of school districts throughout California since our founding in 1996. We have completed more than 365 searches for California school boards since that time. More than 85% of the superintendents selected have remained in their positions more than five years. We are an executive search firm that focuses its work in California, which has helped us deepen our understanding of the ever-changing California educational landscape. Our work includes partnering with Boards in several similar and/or nearby districts such as La Habra City School District, Duarte Unified School District, Newhall School District, Alta Loma School District, Riverside Unified School District, East Whittier City School District, Orange Unified School District. Through the continued participation of several of our partners in education organizations such as the California Collaborative for District Reform, we have remained current on key education policy and system wide developments including Local Control and Accountability Plan (LCAP) and Local Control Funding Formula (LCFF) legislation. We have a strong record of success in helping districts find superintendents who meet the profile developed by the Board with extensive engagement from staff, parent leaders and community led by Leadership Associates.

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

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

- The District and Board are proud of the fifteen award-winning schools serving the communities of Saugus, Valencia, and Canyon Country.
- Saugus Union SD is a high achieving district with excellent test scores and a dedicated and highly qualified teaching, classified and administrative staff.

- The District has been recognized at both the state and national level for their schools and award-winning PTAs and parent groups.
- “*Extraordinary Excellence Everyday*” exemplifies the investment the district and community have made for all stakeholders including students, parents, colleagues and the community.

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


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

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

Respectfully,

A handwritten signature in blue ink that reads 'Kent Bechler'.

Kent Bechler, Ph.D.
Lead Consultant, Leadership Associates

A handwritten signature in blue ink that reads 'Michael F. Escalante'.

Michael Escalante, Ed.D.
Co-Lead, Leadership Associates



EXECUTIVE SUMMARY

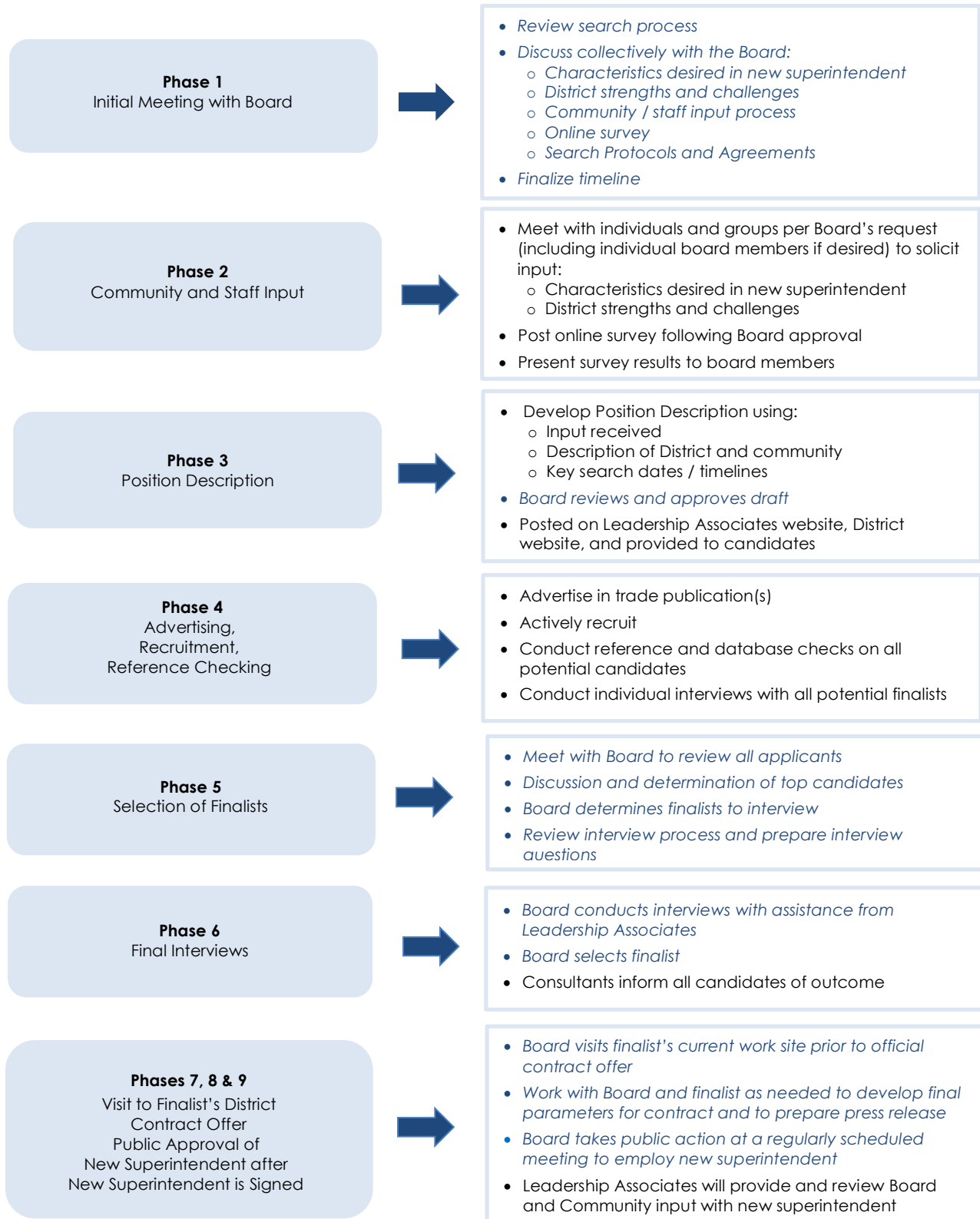
Leadership Associates is a California executive search firm with a national reach that specializes in helping California School Boards find new superintendents. We have done so since 1996 and have assisted with more superintendent searches than any search firm working in California. Our success is based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

1. We view each district as unique and therefore work as partners with the Board to develop a customized approach that the Board may use to select its new superintendent.
2. Through more than 365 searches in California we have developed processes that lead to the successful hiring of superintendents, and other education executives, who meet the profile developed by the Board. These processes include engaging key stakeholders, conducting extensive recruiting and thorough reference checking, and working with the Board throughout the interview and contract approval processes.
3. Our partners are all former superintendents with successful leadership experiences in a variety of districts and in state and national organizations. We know the work. And we know who will do it well.
4. We understand and respect the factors that contribute to a highly effective governance team. We are committed to helping Board members work collaboratively with each other throughout the various stages of the selection process. Done well, a search will always strengthen the work of the Board and pave the way for a successful superintendent.
5. We bring the Board highly qualified candidates. In some respects our job is to make your ultimate decision a difficult one. We are proud of the high quality leaders we have been able to bring forward for Board consideration.
6. Our belief is that in order for superintendents to be successful they must have successful leadership experience leading and managing complex organizations. They should know what excellence in curriculum and instruction looks like and be deeply committed to equity. Their behavior must be of the highest integrity and reflect ethical values in their relationships with students, staff, community, and the Board. They must support powerful teaching and learning, build leadership capacity, and strengthen systems and processes that support high levels of achievement for all students
7. We will always provide our best recommendations to the Board including those related to the hiring of specific candidates and the importance of maintaining a high degree of confidentiality so that the best possible candidates come forward.

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



SEARCH PROCESS FLOWCHART



Note: *Blue italicized text* indicates Board Participation



PROPOSED TIMELINE

Saugus Union School District Superintendent Search, 2018

Timeline is flexible and based on Board direction

DEC 2017- JAN 2018	December 22	District receives proposals
	January 16	<i>Proposal Presentations / Board Selects Firm</i>
FEBRUARY 2018 Phases 1-4	Early February	<i>Board meets with consultants and determines characteristics, skills & qualities desired in a new Superintendent Board publicly announces timeline and procedures for Superintendent selection</i>
	Mid February	Consultants meet with staff and community designated by Board to receive input; Online survey is posted to SUSD website
	February	Consultants identify potential candidates; Development and posting of recruitment materials and Position Description
	February 5 & 12	Advertising and active recruitment; Ad appears in AASA and EdCal (two consecutive weeks)
MARCH 2018 Phase 5	March 5, 5:00 PM	Deadline for applications
	March	Consultants complete comprehensive reference and background checks on applicants
	Mid-March	<i>Board meets with consultants, reviews all applications and selects finalists to be interviewed</i>
APRIL 2018 Phases 6-8	Early April	<i>Board interviews finalists</i>
	Mid April	<i>Board completes validation visit of leading candidate's community and makes final determination on selected candidate.</i>
	Mid-Late April	<i>Board approves superintendent contract at a regularly scheduled board meeting</i>
MAY 2018 Phase 9	May 1 (or a mutually agreed upon date)	New Superintendent begins



QUALIFICATION STATEMENT

SEARCH PROCESS PLAN

Leadership Associates has developed criteria to provide the Board of Education with a 9-phase process for selecting its next superintendent. The following is a brief description of each of the key steps of the search process. We provide this outline to give you an overview, but also for your reference so you know what we are doing on your behalf throughout the search and particularly in the periods of time between our meetings with you.

*(*Indicates meetings with the Board)*

Phase 1: *Initial Meeting with the Board

Leadership Associates will meet with the Board upon our selection to represent your district. At this meeting we will discuss all matters addressed in the Request For Proposal (RFP) Scope of Services, including the characteristics the Board is seeking in the next superintendent; District strengths and challenges for the future; the process for engaging groups and individuals in the District and community in the search process; the final timeline and meeting dates; Board and Search Firm protocols during the search; possible contract parameters for the new superintendent; potential internal candidates; the Board's liaison with Leadership Associates and spokesperson for the Board; and all other matters addressed in the RFP Scope of Services which the Board may wish to discuss. We will also meet with Board members individually, in person or by phone to learn each member's unique perspective.

Phase 2: Community and Staff Input

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

Phase 3: Position Description

The Position Description is prepared to reflect input received on qualities and characteristics desired, a description of the District and community, and key search dates. The Board reviews the draft and makes changes before the description is finalized. The description is posted on our website, distributed widely, and can be posted on the District's website.

Phase 4: Advertising, Recruitment, Reference Checking

After our meetings with the Board, staff and community, we advertise and actively recruit both statewide and nationally. We will also conduct reference and database checks on all potential candidates. All partners participate in this process in order to take advantage of our extensive state and national network. These are very critical activities as we work diligently to find the candidates that best match those qualities and characteristics on the Position Description. We verify degrees, credentials and professional experiences. We do extensive confidential reference checking including conversations with people not listed on the candidate's application. We keep the Board informed on a regular basis about the progress of the search.

Phase 5: *Selection of Finalists

At this meeting we will review and discuss all applicants, recommend candidates you should consider interviewing, and explain our rationale for recommending some and not others. We will provide an executive summary on each candidate that will include a tiered ranking of candidates for your review. The Board, however, makes the final decision on those to be interviewed and determines the interview schedule and location. We offer sample interview questions and assist the Board in finalizing them. In addition to making interview arrangements with the candidates, we provide all the materials the Board needs for the interview, and make logistical arrangements in coordination with the superintendent's assistant or designated district liaison.

Phase 6: *Final Interviews

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

Phase 7: Visit to the Finalist's District and Contract

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

Phase 8: Public Approval of the New Superintendent

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

Phase 9: After the New Superintendent is Signed

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

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

BEST PRACTICES FOR SELECTING A SUPERINTENDENT

Superintendent transitions provide opportunities for organizational growth and development. With the increasing challenges and needs faced by children in school districts, the selection of a new superintendent is the most important decision a school board will make. This decision will have an immediate and lasting impact on student achievement, school climate and culture, student attitudes, teacher morale, parent expectations and community vitality. Perceptions of teaching and learning have changed during the last ten years and with that have come a change in expectations for school leaders.

Best practices for the selection of a new superintendent include:

<u>Best Practices</u>	<u>Leadership Associates</u>
• Determine and clarify needs of the organization	✓
• Select a qualified search firm	✓
• Develop search protocols	✓
• Solicit meaningful engagement, input and feedback from all stakeholders	✓
• Use relevant data in developing the position description	✓
• Develop search transition agreements	✓
• Communicate superintendent search updates	✓
• Strategic recruiting and advertising	✓
• Thoughtful review of candidates	✓
• Rigorous interview process	✓
• Select the final candidate	✓

- ✓ **Determine and Clarify Needs of the Organization** – School districts, employees and communities should pay close attention to the organizational needs of the district, students and employees prior to hiring a new superintendent. These should be well understood at the beginning of the search process and reflected in the Position Description. Leadership Associates will assist the Board in this process.
- ✓ **Selection of a Qualified Search Firm** – This includes preparation of a Request for Proposal (RFP) which provides background on the District, lists questions to which the firm should respond and indicates the criteria that will be used to select a firm. Boards should seek references and background information on firms before making a final decision. Interviews with search firms should have ample time allotted for Board questions and Search Firm responses. Leadership Associates encourages Boards to contact references and use the Internet and other sources to obtain background information on the work of all interested search firms.
- ✓ **Develop Search Protocols** – The Board and Search Firm should agree on protocols to guide the search and any potential issues related to contract parameters.
- ✓ **Solicit Meaningful Engagement, Input and Feedback from All Stakeholders** – An extensive process for stakeholder engagement is critical before the hiring process begins. This ensures accurate data, buy-in and support for both the process and the final candidate. Multiple opportunities should be provided for people to participate.
- ✓ **Use Relevant Data in Developing the Position Description** – This is a key document because it informs the recruiting, reference checking, and interview processes. It should include the information identified and collected from the District database as well as the input received from the various District focus groups on qualities and characteristics desired, including a description of the District and community. It is critical that the selected candidate is hired for the district he/she will lead and not just the position.
- ✓ **Develop Search Transition Agreements** – Prior to the selection of the superintendent there should be a discussion of the leadership transition process, the roles and responsibilities for the next superintendent, and District and Superintendent goals for the coming year.

- ✓ **Communicate Superintendent Search Updates** – Opportunities for regular Board and community updates are critical to both the process and the calibrating of the search criteria as needed.
- ✓ **Strategic Recruiting and Advertising** – Utilizing and tapping into key professional educational networks, outside organizations, business leaders, labor groups, and media outlets are critical in identifying the “match” of candidates for the next superintendent.
- ✓ **Thoughtful Review of Candidates** – The application process provides an initial screening of qualifications; however, an in-depth confidential review of each candidate is critical as a predictor of future performance and success. Reference checking should include people not listed by the candidates. Checking databases is also essential as well as background checks for the finalists.
- ✓ **Rigorous Interview Process** – Leadership Associates remains with the Board during the entire interview process. We help the Board develop questions which are linked to the position description and are carefully analyzed and discussed prior to the interview. Additionally, each question response should be independently rated to assist in the review of candidate performance. All interviewees should be asked a similar set of questions in the first round. The second round with finalists is more informal.

Search committee members commonly make decisions about candidates within the first three minutes of an interview and base these decisions upon personal attraction, candidate reputation or candidate connections to a Board member. Well coached candidates know this. In hiring, it is important to consider these initial reactions but remain focused on the goals and criteria for the hire. The hiring process should be methodical in surfacing these initial reactions and helping Board members make a well-informed decision and to resist the quick and emotional decision.

- ✓ **Selecting the Final Candidate** – The Search Firm should provide protocols to assist the Board with its deliberations about the final candidates and be prepared to assist in arranging a site visit if desired. Representatives of the firm should be available to facilitate the deliberation process.

EXPERIENCE AND QUALIFICATIONS OF THE FIRM

Leadership Associates has conducted over 365 executive searches in California since 1996. We have 15 partners and associates, all active educators and former, successful California superintendents who reside throughout the state – north, south, and central valley. While we are dedicated to California school districts, we have networks throughout the country and have assisted many school boards in finding top candidates from outside the state.

A few other facts about the partners of the firm:

- All keep superintendent searches as their core work
- All have national and state-wide networks and alliances including Council of the Great City Schools; Urban Dialogue; Association of California School Administrators (ACSA); California Association of Latino Superintendents and Administrators (CALSA); American Association of School Administrators (AASA); Suburban School Superintendents; and California City School Superintendents
- All belong to organizations which include top and emerging leaders
- Three were California State Superintendent of the Year
- Three chaired the California state superintendent's committee for ACSA; two were presidents of ACSA
- A number are bi-lingual in Spanish

- Many facilitate workshops in districts throughout the state: board/superintendent relations; board/superintendent protocols; strategic planning; superintendent evaluations; team building; and instructional improvement. Several coach and mentor superintendents and other top district leaders
- Most have taught or are currently teaching leadership courses at universities
- All have received awards for educational and community work, regionally, statewide, and nationally; and one was honored by the Mexican Consulate
- Partners have authored or co-authored the following publications; *A Practical Guide to Effective School Board Meetings*; *Eight at the Top*; *Superintendent-School Board Practices*; and *The Superintendent's Planner*

PERSONNEL QUALIFICATIONS

LEAD CONSULTANTS

Kent L. Bechler, Ph.D – Lead / Partner, Leadership & Organizational Development

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

Michael Escalante, Ed.D – Co-Lead / Partner

Mike served as Superintendent of the Glendale Unified School District in Los Angeles County and the Fullerton Joint High School District in North Orange County for a total of 13 years, 6 ½ in each district. He earned his Bachelor's Degree from San Diego State University, Master's Degree in Education from Loyola Marymount University and Doctorate in Educational Leadership from the University of Southern California. Mike serves as a doctoral level instructor at the University of Southern California Rossier School Of Education. He teaches educational leadership and has responsibility for chairing doctoral dissertations. Mike's academic interest is in the area of building effective board superintendent relationships. During his 38 year career in public education, he served in professional organizations including Association of California School Administrators (ACSA), The USC Dean/Superintendent Advisory Committee Southern (DSAC), Southern California Superintendents, Urban Superintendent Dialogue, Educational Research Development Institute (ERDI), California Latino Superintendents' and Administrators' Association (CALSA), Association of Latino Administrators and Superintendents (ALAS).

SEARCH SUPPORT CONSULTANTS

Eric D. Andrew, Ed.D – Associate

Eric served as Superintendent of Campbell Union School District from February 2010 until his retirement in 2017. Throughout his education career from 1979 through 2017, he has served in the districts of Claremont, Redlands and Glendora Unified as a teacher, Director of Student Services and Assistant Superintendent of Educational Services. Eric teaches in the National

Association of School Superintendents' Leadership Educational Administration Program for the Santa Clara County Office of Education. He has earned several distinctions, including being named a finalist for the National Association of School Superintendents (NASS) Superintendent of the Year and ACSA Region 8 Superintendent of the Year. He holds a masters degree in education from Cal-Poly Pomona and a doctorate in education from the University of LaVerne.

James R. (Jim) Brown – Partner, Senior Advisor

James R. (Jim) Brown served as Superintendent of Schools for the Glendale, Palo Alto and Lompoc Unified School Districts. He was also Superintendent of the Cambria Union Elementary and Coast Union High School Districts. Jim received his Master's Degree from the University of Kansas and his B.S.F.S. Degree from Georgetown University, Washington, D.C. He chaired the ACSA Superintendents Committee and the ACSA Urban Superintendents Committee. He also served as co-chair of the California State Mathematics Task Force and the High School Exit Exam Panel. He was a member of the It's Elementary Task Force. He was President of the National Suburban School Superintendents' Association and Schools for Sound Finance. Jim has experience conducting executive searches since 2004, and has facilitated or assisted in the facilitation of more than 55 executive searches since that time. Jim served as senior advisor for Pivot Learning Partners. His areas of focus were: Teacher and Principal Effectiveness, Governance, the Strategic School Funding for Results Project, Executive Coaching, and documentation of education innovations. Jim has been a member of the Board of Directors of Glendale Memorial Hospital, the American Leadership Forum and the Southern California Leadership Network. He has served in leadership roles in numerous community and civic groups.

Marc A. Ecker, Ph.D – Partner

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

Richard Fischer – Partner

Rich served as Superintendent of Schools for 19 years in the Mountain View Los Altos Union High School District, Lake Tahoe Unified School District and the Harmony Union School District. He currently serves as Director of the Executive Leadership Center and is also a member of the El Dorado County Board of Education. Rich has been Director for the ACSA Superintendents' Academy and presenter and trainer for California Association of School Business Officials, California Foundation for Improvement of Employer-Employee Relations (CFIER), California State Superintendents' Symposium, El Dorado County Instructional Leaders - Series on Effective Leadership Techniques, Leadership Mountain View, and California School Leadership Academy. He has been honored as ACSA Regions 1,2,3 Superintendent of the Year and Administrator of the year as well as being named Los Altos of the Year in 2006. Rich received his Bachelor of Arts Degree from California State University, Northridge and his Master's Degree from California State University, Sacramento.

Sally Frazier, Ed.D – Partner

Sally was elected Madera County Superintendent of Schools for six consecutive 4-year terms. She received her Doctorate from University of Southern California, and her Master's and

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

Juan Garza – Associate

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

Peggy Lynch, Ed.D – Partner

Peggy served as Superintendent for San Dieguito Union High School District in San Diego County until her retirement in April 2008. She also served as Superintendent of the Brea Olinda Unified School District in North Orange County for seven years, part of her nearly 14 years serving as a superintendent. Peggy has experience conducting executive searches since 2009, and has facilitated or assisted in the facilitation of more than 30 executive searches. She received her doctorate from the University of La Verne, her Master's Degree from Fullerton and her Bachelor's Degree from Parsons College in Iowa. Peggy chaired the ACSA Orange County and San Diego County Superintendents, was chair of the ACSA Superintendents' Symposium and ACSA's State Annual Conference. Peggy has received recognition from various organizations, including Southern California Women in Educational Management, Stanford University School of Engineering and the PTA. She has also co-authored several books, including *Effective Superintendent-School Board Practices*; *The Superintendent's Planner*, *A Monthly Guide and Reflective Journal*; and *Eight at the Top: A View Inside Public Education*.

Phil Quon – Partner, Chief Financial Officer

Phil served as Superintendent for 19 years in the Bay Area – 13 years at Union School District in San José and the last six years in Cupertino Union School District. He served as the President of the statewide ACSA Superintendents Council, the Chair of the ACSA Superintendents' Symposium, and the President of the California City School Superintendents. He also served on the American Association of School Administrators (AASA) Governing Board and on the CSBA Annual Education Conference Planning Committee and Education Legal Alliance Advisory Group. He has been the Director of the ACSA Superintendents Academy as well as a presenter in the ACSA "Leading the Leaders" Program for newly appointed superintendents in California. He has chaired numerous WASC accreditation teams in California and Hawaii. Phil was a member of the CTC Teaching Mathematics Advisory Panel and a contributor to the National Journal Online Education Blog. Phil received his Bachelor's Degree in Mathematics from UCLA and his Master's Degree in Education Administration from CSULA.

Dennis M. Smith, Ed.D – Partner

Dennis served as Superintendent of Schools for the Placentia Yorba Linda Unified School District (25,000 ADA) in Orange County until his retirement in June 2012. He also served as superintendent of the Orange County Public Schools in Orlando, Florida, the 16th largest school district in the United States. Prior to that, he served as superintendent of the Irvine Unified, Cajon Valley Union and Laguna Beach Unified School Districts. Dennis served a total of 26 years as a Superintendent of Schools. Dennis has experience conducting executive searches since

2005, and has facilitated or assisted in the facilitation of more than 20 executive searches. Dennis was recognized as one of the top 100 Executive Educators in North America by the National School Boards Association, one of the 89 Rising Stars to Watch by the Los Angeles Times, one of the 100 Most Influential Business Leaders in Central Florida by the Orlando Business Journal, and the ACSA Region XVII Superintendent of the Year. He also served as President of the Southern California Superintendents' Association. Dennis received his Bachelor of Arts and Master's Degree from Arizona State University and his Doctorate from the University of Arizona. In addition, he has been an adjunct faculty member at California State University, Fullerton. Dennis has spoken at the local, state and national level on Board- Superintendent relations, Strategic Planning and Goal Setting and Organizational Management. He has consulted with school districts across the United States assisting school boards with superintendent searches and conducting workshops, trainings and organizational efficiency audits.

Rich Thome – Partner

Rich served as Superintendent of Schools for South Bay Union School District and Cardiff Elementary School District. He has conducted more than 65 executive searches and more than 104 Board workshops or Superintendent Evaluations with School Boards. He also serves as part-time as Director of Partnerships for the Institute for Entrepreneurship in Education (IEE), a professional development and research center in the School of Leadership and Education Sciences (SOLES), at the University of San Diego. Rich recently served on the University of San Diego School of Leadership and Education Sciences Advisory Board and on the Classroom of the Future Foundation Board of Directors. He received his Bachelor's Degree from California State University, Los Angeles, and his Master's Degree from Pepperdine University. He is fluently bilingual in Spanish and received his Bilingual, Cross Cultural Specialist credential in California. Rich has been honored with the Honorary Service Award from the California Congress of Parents, Teachers and Students; The Orange County Hispanic Educator of the Year Award; and the Apple Distinguished Educator Award. Rich gained state-wide distinction while serving as Chairperson of the Superintendents' Technology Advisory Committee and leading the expansion of technology centers and efforts of school districts throughout the region as the Assistant Superintendent of Technology and Human Resources for the County of San Diego.

Sandy Sanchez Thorstenson – Partner

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

David J. Verdugo, Ed.D – Partner

David served as Superintendent of Schools for the Paramount Unified School District (17,000 ADA) in Los Angeles County for 9 years. He also served as the Assistant Superintendent of the Placentia-Yorba Unified School District (25,000 ADA) and has held positions of Assistant Superintendent, Director of Secondary Education, Principal at both Elementary and High School levels as well as teacher and coach. David has served a total of 43 years in the field of education spanning Grades K-12. During his 43 years in the field of education, his duties have included school facility management; extensive involvement with budget development, implementation of technology programs, employer/employee relations, curriculum and instructional strategies, and organizational development. His experience includes servicing students of diverse populations and socioeconomic levels in urban and suburban settings. He was named ACSA's 2008 Region 14 Superintendent of the Year, and received the California State University Long Beach Outstanding Superintendent Leadership Award in 2012 and the Association of Latino Administrators and Superintendents (ALAS) National Outstanding Educator Award in 2013. He earned his Bachelor's Degree from Whitworth College in Spokane, Washington and his Master's Degree from the University of La Verne. His Doctoral Degree in Educational Administration was earned at the University of Southern California. Dr. Verdugo is a past Governing Board member to AASA and has addressed and spoken on State and National topics from building a case for reform to the importance of Arts in schools. Currently he is the Executive Director of the California Association of Latino Superintendents and Administrators (CALSA) as well as the former Superintendents' Leadership Academy Director for the Association of Latino Administrators and Superintendents (ALAS) based in Washington, D.C.



COST PROPOSAL

SAUGUS UNION SCHOOL DISTRICT

TOTAL FEE TO CONDUCT SEARCH FOR NEW SUPERINTENDENT – All Inclusive: \$23,500

This fee includes:

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



SAMPLE CONTRACT

LEADERSHIP ASSOCIATES

www.leadershipassociates.org

3905 State Street #7-407
Santa Barbara, CA 93105
(805) 364-2775

AGREEMENT FOR CONSULTANT SERVICES

THIS AGREEMENT is made this **17th day of January 2018** between LEADERSHIP ASSOCIATES, hereinafter called the Contractor, and **SAUGUS UNION SCHOOL DISTRICT**, hereinafter called the District.

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

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

The District agrees to pay the Contractor **TWENTY-THREE THOUSAND, FIVE HUNDRED DOLLARS (\$23,500)** for services provided. Payment is to take place in two increments: **(1) \$11,750** upon completion of stakeholder input, and **(2), \$11,750** upon selection of a finalist. The Contractor will submit invoices to the District for each of the payment increments. Payments are due within 30 days of receipt of invoice.

The Contractor is to perform the above services beginning January 17, 2018.

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

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

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

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

DISTRICT:
SAUGUS UNION SCHOOL DISTRICT

By: _____

By: _____

Name: Kent Bechler, Ph.D.

Name: _____

Title: Consultant

Title: _____

Date: _____

Date: _____



REFERENCES

SAUGUS UNION SCHOOL DISTRICT SUPERINTENDENT SEARCH, 2018

1. District: [LA HABRA CITY SCHOOL DISTRICT](#)
Contract Service: Superintendent Search
Contact: John Dobson
Title: Member
Phone: (562) 773-0644
Email: jdobson3@mac.com
2. District: [DUARTE UNIFIED SCHOOL DISTRICT](#)
Contract Service: Superintendent Search
Contact: Ken Bell
Title: Board President
Phone: (626) 599-5000 (District)
Email: KBell10044@aol.com
3. District: [SAN MARINO UNIFIED SCHOOL DISTRICT](#)
Contract Service: Superintendent Search
Contact: Chris Norgaard
Title: Board President (at time of the search)
Phone: (626) 755-0810
Email: cnorgaard@regentbc.com
4. District: [RIVERSIDE UNIFIED SCHOOL DISTRICT](#)
Contract Service: Superintendent Search
Contact: Tom Hunt
Title: Board President
Phone: 951-788-7135, ext. 80417
Email: thunt@rusd.k12.ca.us



EXECUTIVE SEARCHES 2013-2017

STATEWIDE

Association of California School Administrators (ACSA)
California Collaborative for Educational Excellence (CCEE)
WestEd/GATES

Executive Director
Executive Director
Executive Director

COUNTY OFFICE OF EDUCATION SUPERINTENDENT

Los Angeles County – 2011
Santa Clara County – 2008

1,500,000+ ADA
275,000+ ADA

SCHOOL DISTRICT SUPERINTENDENT (2013-Current)

<u>District</u>	<u>County</u>	<u>ADA</u>
Fresno Unified	Fresno	73,356
San Francisco USD	San Francisco	58,865
Santa Ana USD	Orange	57,410
Capistrano USD	Orange	53,833
Corona-Norco USD	Riverside	53,148
Sacramento City USD	Sacramento	47,616
Oakland USD	Alameda	46,486
Riverside USD	Riverside	42,560
Fontana USD	San Bernardino	40,374
San Jose USD	Santa Clara	32,938
Anaheim Union HSD	Orange	32,085
Mt. Diablo USD	Contra Costa	31,923
San Ramon Valley USD	Contra Costa	31,900
West Contra Costa USD	Contra Costa	30,596
Bakersfield City SD	Kern	30,262
Orange Unified School District	Orange	28,522
Saddleback Valley USD	Orange	27,803
Rialto USD	San Bernardino	26,468
Placentia-Yorba Linda USD	Orange	25,821
Palm Springs USD	Riverside	23,332
Lake Elsinore USD	Riverside	22,000
Hemet USD	Riverside	21,977
Pajaro Valley USD	Santa Cruz	20,438
Folsom-Cordova USD	Sacramento	19,865
Anaheim City SD	Orange	19,312
Coachella Valley USD	Riverside	18,861
Antioch USD	Contra Costa	18,352
Ventura USD	Ventura	17,430
Santa Rosa City Schools	Sonoma	16,700
Oxnard School District	Ventura	16,533
Burbank USD	Los Angeles	16,207
Cajon Valley Union SD	San Diego	16,059
Paramount USD	Los Angeles	15,681
Walnut Valley USD	Los Angeles	14,658
Vallejo City Unified School District	Solano	14,554

<u>District</u>	<u>County</u>	<u>ADA</u>
West Covina USD	Los Angeles	14,402
Fullerton SD	Orange	13,661
Vacaville USD	Solano	12,561
Inglewood USD	Los Angeles	12,570
San Dieguito Union HSD	San Diego	12,485
Palo Alto USD	Santa Clara	12,357
Natomas USD	Sacramento	12,300
Metropolitan Education	San Jose	12,000
Oak Grove School District	Santa Clara	11,800
Victor ESD	San Bernardino	11,531
Franklin---McKinley SD	Santa Clara	11,269
Lucia Mar USD	San Luis Obispo	10,710
Pittsburg USD	Contra Costa	10,560
Azusa USD	Los Angeles	10,518
Dublin USD	Alameda	10,000
Roseville City ESD	Placer	9,943
Yucaipa---Calimesa Joint USD	San Bernardino	9,655
Ocean View SD	Orange	9,461
East Whittier City ESD	Los Angeles	8,829
Davis Jt. USD	Yolo	8,626
San Mateo Union HSD	San Mateo	8,163
Novato USD	Marin	8,078
South Bay Union ESD	San Diego	7,682
Santa Maria JUHSD	Santa Barbara	7,633
Santa Cruz City Schools	Santa Cruz	7,092
Newhall SD	Santa Clarita	6,831
Fountain Valley USD	Orange	6,337
Newark USD	Alameda	6,294
Ukiah USD	Mendocino	6,214
Brea Olinda USD	Orange	5,973
Alta Loma SD	San Bernardino	5,900
Orcutt Union ESD	Santa Barbara	5,087
Oakley Union SD	Contra Costa	4,871
Moreland SD	Santa Clara	4,670
San Lorenzo Valley USD	Santa Cruz	4,444
Ravenswood City SD	San Mateo	4,296
Paradise USD	Butte	4,261
Duarte USD	Los Angeles	4,247
Lindsay USD	Tulare	4,150
Central Union HSD	Imperial	4,104
Cypress SD	Orange	4,000
Eureka City Schools	Humboldt	3,884
Amador County USD	Amador	3,829
Lemon Grove SD	San Diego	3,797
Mountain View-Los Altos UHSD	Santa Clara	3,753
Goleta Union SD	Santa Barbara	3,718
Del Norte County USD	Del Norte	3,591
Cabrillo USD	San Mateo	3,357

District

Cambrian SD
San Marino USD
Exeter Public Schools
Standard ESD
South Whittier ESD
San Bruno Park ESD
Castaic Union SD
Fowler USD
Scotts Valley USD
Jefferson SD
Carmel USD
Bear Valley USD
Galt JUHSD
Lammersville JUSD
Red Bluff Union ESD
Plumas USD
Fort Bragg USD
Willits USD
Byron Union SD
Reed Union SD
Larkspur-Corte Madera
Las Lomas Elementary SD
St. Helena USD
Kentfield SD
Taft UHSD
University Preparatory School
Bass Lake JUSD
Rancho Santa Fe SD
Kings River Union Elementary SD
Alview-Dairyland Union SD

EXECUTIVE DIRECTOR/DIRECTOR

Baldy View ROP
Birmingham Community Charter HS
Oxford Preparatory Academy
San Ramon Valley SELPA
So Orange County SELPA
West End SELPA
West San Gabriel Valley SELPA

County

Santa Clara
Los Angeles
Tulare
Kern
Los Angeles
San Mateo
Los Angeles
Fresno
Santa Cruz
San Joaquin
Monterey
San Bernardino
Sacramento
San Joaquin
Tehama
Plumas
Mendocino
Mendocino
Contra Costa
Marin
Marin
San Mateo
Napa
Marin
Kern
Shasta
Madera
San Diego
Tulare
Madera

ADA

3,349
3,146
3,000
2,979
2,918
2,785
2,568
2,562
2,482
2,477
2,468
2,453
2,287
2,200
2,178
2,130
1,917
1,907
1,686
1,556
1,523
1,336
1,295
1,177
1,045
900
891
700
476
367

San Bernardino
Los Angeles
Orange
Contra Costa
Orange
San Bernardino
Los Angeles



COMMENDATIONS

The following are excerpts from letters of recommendation written by boards that selected Leadership Associates as their search consultant.

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

Larkspur-Corte Madera School District: "Searching for and choosing a superintendent is one of, if not the, most important pieces of work a school board can undertake and Leadership Associates was the absolute right fit for our search needs. Our consultants' collective years of experience as successful superintendents themselves elevated our thoughtful and thorough search process. They helped us identify our needs and reached out to their extensive network, bringing forward to our board a rich field of candidates for consideration. The consultants were responsive, patient, and adaptive to our process. We worked well as a team and that made all the difference."

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

Whittier City School District: "Leadership Associates' process ensured the school and community that the Board valued their input and wanted them to fully participate in the process. Leadership Associates was very accessible to our needs and calls. We are extremely pleased with the support we received ...and would rehire them again without question."

Plumas Unified School District & Plumas County Office of Education: "Leadership Associates are exceptional at what they do. They helped us find an amazing superintendent, which has allowed us to move forward in achieving our educational goals. We would emphatically recommend Leadership Associates to any district looking to fill a superintendent vacancy. Their outstanding competence and character combined to make the experience both wildly successful and pleasant. We don't anticipate needing another superintendent for quite some time, but if we did, we would call them immediately."

East Whittier City School District: "The Board of the East Whittier City School District wishes to thank your organization for appointing Sandy Sanchez Thorstenson and Marc Ecker to supervise and coordinate our superintendent search this spring. I am confident that I don't need to tell you that Sandy and Marc are two exceptional individuals to work with, but I will anyway. They ran the interviews like clockwork with plenty of time for reflection of each candidate at the end of the interview. We were presented with six outstanding candidates, which we enjoyed. It was challenging to decide which of the candidates was the best fit for our District. We are confident that our choice of superintendent is that best choice. We were delighted to work with Sandy and Marc, and will gladly recommend them as the premier search team."

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

Franklin-McKinley SD: "Once selected as the superintendent search firm by the board, we were immediately contacted to begin the process following the step-by-step process submitted with the proposal. I was especially pleased that all of the steps were followed and that there were no "surprises" throughout the search that could have potentially caused uneasiness by the board."

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

Palo Alto Unified School District: "We recognize the selection of a superintendent is the most important decision we make as a school board. Leadership Associates designed an effective process to get to know us and to meet our needs - including recruiting candidates who were not looking for a new position."

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

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

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

San Ramon Valley USD: "Your team was responsive to questions raised during the process. The background checks on our candidates were thorough and there were no surprises."

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

Palo Alto USD: "Not only does Leadership Associates bring an incredible wealth of experience and competence to the task, they also are so personally engaging and professional that it makes the process most pleasant."

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

Santa Ynez Valley UHSD: "We are extremely pleased with our choice, but feel that the other candidates we interviewed would have been excellent as well. You actually made our lives more difficult by providing such great candidates from which to choose."

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

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

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

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

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

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