

A Proposal Prepared for

Saugus Union School District

Santa Clarita, California

for

*The Search and Selection of a
Superintendent of Schools*

submitted in collaboration with



by

MCPHERSON  **JACOBSON, LLC**
EXECUTIVE RECRUITMENT & DEVELOPMENT



7905 L St., Suite 310
Omaha, Nebraska 68127
Phone: 888-375-4814/402-991-7031
Fax: 402-991-7168
Email: mail@macnjake.com
Website: www.macnjake.com



MCPHERSON & JACOBSON, L.L.C.
Executive Recruitment & Development
in collaboration with the California School Boards Association



7905 L St., Suite 310 ♦ Omaha, Nebraska 68127 ♦ Phone: (402) 991-7031/(888) 375-4814
Fax: (402) 991-7168 ♦ Email: mail@macnjake.com ♦ Website: www.macnjake.com

December 5, 2017

Board of Trustees
Saugus Union School District
Santa Clarita, California 91355

Thank you for your request for information. The enclosed proposal describes the professional services the California School Board Association representative, McPherson & Jacobson, L.L.C. will provide Saugus Union School District 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.

McPherson & Jacobson has been conducting searches for boards of education since 1991. We have over 100 consultants across the United States, including 15 in California who will ensure your search results in quality leadership for your district.

Our contact information:

McPherson & Jacobson, L.L.C.
7905 L St., Suite 310
Omaha, Nebraska 68127
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.

California School Board Association Search Service

The California School Board Association has selected McPherson & Jacobson, L.L.C. to represent them in conducting superintendent searches in California. McPherson & Jacobson is a leading national search firm that has California-based consultants. Our California consultants understand California and its unique requirements and laws.

Leading National Search Firm

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 675 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. Almost 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 (2006) 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.

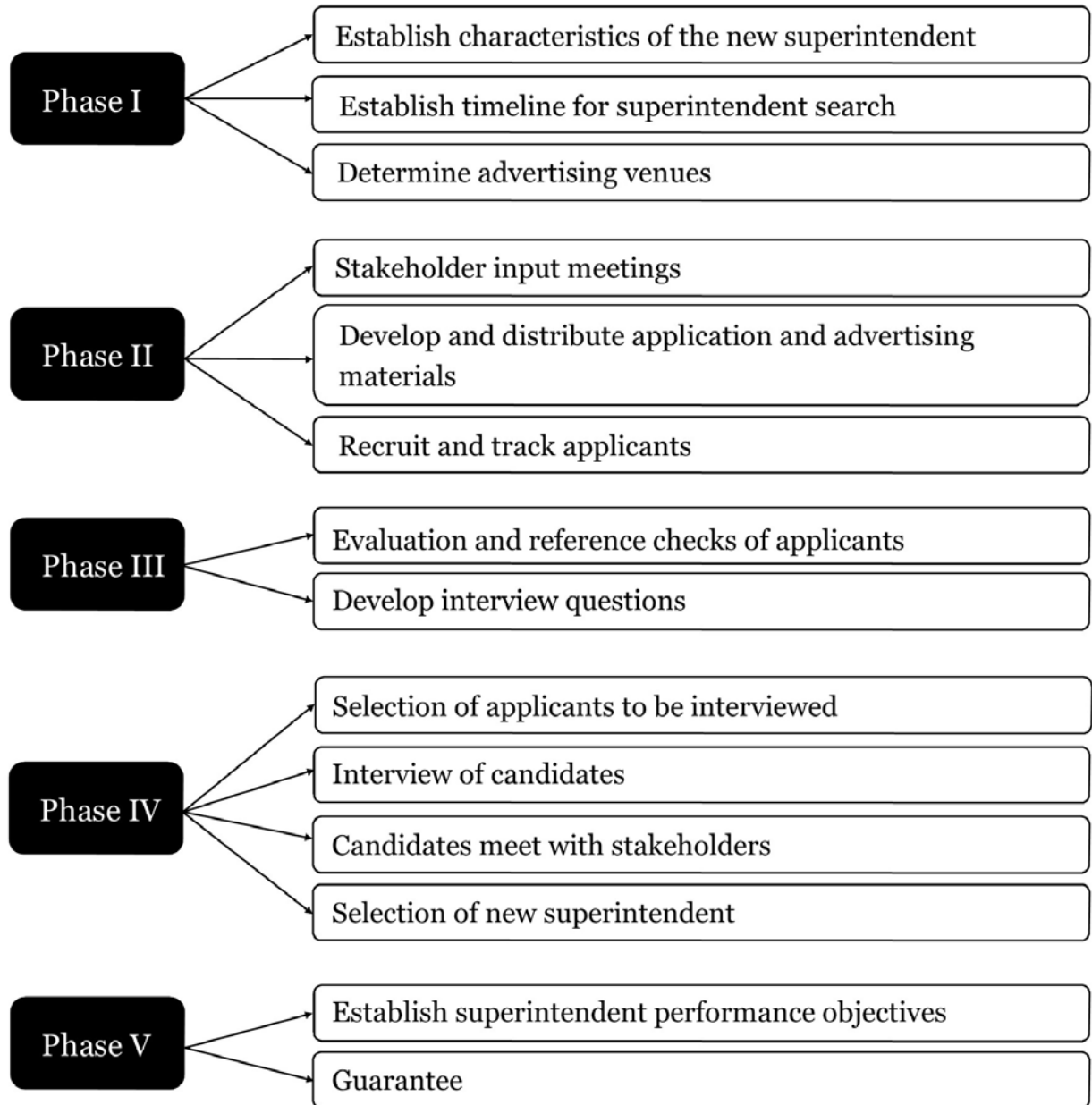
Executive Summary

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

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

Five Phases of a Superintendent Search



Phase I

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

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

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

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

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

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

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

- ✓ **Identify appropriate stakeholder groups.**

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

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

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

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

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

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

Phase II

In Phase II McPherson & Jacobson's consultants will:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

✓ **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.

✓ **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 we recommend 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.

"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

"It gave us peace of mind and made our work much easier. We could focus on our needs rather than getting bogged down and frustrated with the process."

Janet Alonso, Winship-Robbins Elementary School District, Meridian, CA

"The brochure looked very professional, we were pleased."

Tamara Jones, Lakeside Union School District, Bakersfield, CA

"Thorough and open review of all candidates."

Michael Leydon, Newcastle Elementary School District, Newcastle, CA

"Best price, best service."

Bobbie Singh-Allen, Elk Grove Unified School District, CA

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.

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.

✓ **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 spouses/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 spouses/significant others. In order 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.

"This was the first time our district had used a stakeholder committee in addition to the board for input on finalists. The search firm provided outstanding guidance and worked well with district staff to establish a thoughtful productive process."

Priscilla Cox, Elk Grove Unified School District, CA

"High level of professionalism accompanied by a personable and transparent consultant leading a very good process to a very good outcome."

Michael Leydon, Newcastle Elementary School District, Newcastle, CA

"Know what school boards need for district size. Easy to do business with."

Chet Madison, Elk Grove Unified School District, CA

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 have been through this process several times. This process was one of the best"
Jeanette J. Amavisca, Elk Grove Unified School District, CA

"I would highly recommend your firm to other school districts."
Field Gibson, Paso Robles Joint Unified School District, CA

"I was very pleased with the search in every aspect."
Peggy Buckles, Conejo Valley Unified School District, Thousand Oaks , CA

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 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 Saugus Union School District and McPherson & Jacobson, L.L.C.

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

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

Saugus Union School District

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

Investment

The investment for conducting the superintendent search is \$17,000 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.**

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.

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.

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

Alisal Union School District

1205 E. Market St.
Salinas, CA 93905
School Phone: 831-753-5700
Search Year: 2015/16
Enrollment: 9,000

Alpine Union School District

1323 Administration Way
Alpine, CA 91901
School Phone: 707-747-8300
Search Year: 2015/16
Enrollment: 1,700

Benicia Unified School District

350 East K St.
Benicia CA 94510
School Phone: 707-747-8300
Search Year: 2014/15
Enrollment: 5,000

Brawley Elementary School District

261 D Street
Brawley, CA 92227
School Phone: 760-344-2330
Search Year: 2015/16
Enrollment: 4,000

Cold Spring School District

2243 Sycamore Canyon Rd
Santa Barbara CA 93108
School Phone: 805-969-2678
Search Year: 2016/17
Enrollment: 175

Conejo Valley Unified School District

1400 E. Janss Rd
Thousand Oaks CA 91362
School Phone: 805-497-9511
Search Year: 2014/15
Enrollment: 19,500

El Monte Union High School District

3537 Johnson Ave
El Monte CA 91731
School Phone: 626-444-9055
Search Year: 2014/15
Enrollment: 9,500

Elk Grove Unified School District

9510 Elk Grove-Florin Rd.
Elk Grove CA 95624
School Phone: 916-686-5085
Search Year: 2014/15
Enrollment: 62,000

Fallbrook Union High School District

2234 South Stagecoach Lane
Fallbrook CA 92028
School Phone: 760-723-6332
Search Year: 2013/14
Enrollment: 2,600

Fort Sage Unified School District

100 D.S. Hall St
PO Box 35
Herlong CA 96113
School Phone: 530-827-2129
Search Year: 2016/17
Enrollment: 180

Glendale Unified School District

223 North Jackson St.
Glendale CA 91206
School Phone: 818-241-3111
Search Year: 2014/15
Enrollment: 26,200

Gustine Unified School District

1500 Meredith Ave.
Gustine CA 95322
School Phone: 209-854-3784
Search Year: 2014/15
Enrollment: 1,830

Hemet Unified School District

1791 W. Acacia Ave.
Hemet, CA 92545
School Phone: 951-765-5100
Search Year: 2015/16
Enrollment: 21,000

Johnstonville Elementary School District

704-795 Bangham Lane
Susanville, CA 96130
School Phone: 530-257-2471
Search Year: 2015/16
Enrollment: 205

Lakeside Union School District

14535 Old River Road
Bakersfield CA 93311
School Phone: 661-836-6658
Search Year: 2014/15
Enrollment: 1,310

New Haven Unified School District

34200 Alvarado-Niles Rd
Union City CA 94587
School Phone: 510-471-1100
Search Year: 2016/17
Enrollment: 12,148

Newcastle Elementary School District

450 Main St.
PO Box 1028
Newcastle CA 95658
School Phone: 916-259-2832
Search Year: 2014/15
Enrollment: 796

Old Adobe Union School District

845 Crinella Dr.
Petaluma CA 94954
School Phone: 707-695-6633
Search Year: 2013/14
Enrollment: 1,700

Oxnard Union High School District

39 S K St.
Oxnard CA 93030
School Phone: 805-385-2500
Search Year: 2015/16
Enrollment: 16,500

Parlier Unified School District

900 S. Newmark Ave.
Parlier, CA 93648
School Phone: 559-646-2731
Search Year: 2017/18
Enrollment: 3,435

Paso Robles Joint Unified School District

800 Niblick Rd
PO Box 7010
Paso Robles CA 93446
School Phone: 805-769-1000
Search Year: 2013/14
Enrollment: 6,500

Penn Valley Union Elementary School District

14806 Pleasant Valley Rd.
Penn Valley CA 95946
School Phone: 530-432-7311
Search Year: 2014/15
Enrollment: 700

Pleasanton Unified School District

4665 Bernal Ave.
Pleasanton CA 94566
School Phone: 925-462-5500
Search Year: 2015/16
Enrollment: 14,800

Pollock Pines Elementary School District

2701 Amber Trail
Pollock Pines CA 95726
School Phone: 530-644-5416
Search Year: 2015/16
Enrollment: 800

Red Bluff Joint Union High School District

1260 Union St.
Red Bluff CA 96080
School Phone: 530-529-8710
Search Year: 2013/14
Enrollment: 1,622

Richland School District

331 N. Shafter Ave.
Shafter, CA 93263
School Phone: 661-746-8600
Search Year: 2015/16
Enrollment: 3,504

Sausalito Marin City School District

200 Phillips Drive
Marin City CA 94965
School Phone: 415-332-3190
Search Year: 2015/16
Enrollment: 524

Soledad Unified School District

1261 Metz Rd.
Soledad, CA 93960
School phone: 831-678-0786
Search Year: 2016/17
Enrollment: 4,800

Ventura Unified School District

255 W. Stanley Ave., Suite 100
Ventura, CA 93001
School phone: 805-641-5000
Search Year: 2016/17
Enrollment: 17,000

Winship-Robbins Elementary School District

4305 S Meridian Rd
Meridian CA 95957
School Phone: 530-696-2451
Search Year: 2013/14
Enrollment: 200

California Consultants

Mrs. Janice Adams
Retired Superintendent
Benicia, 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
Muroc Joint USD, North Edwards
Bakersfield, California

Mr. Dennis Murray
Retired Superintendent
Murrieta, California

Mr. John Pruitt, Jr.
Former Board Member
Chino, 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

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

Dr. Steve Joel, National Recruiter
Superintendent
Lincoln, Nebraska

Transparency—The McPherson & Jacobson Difference

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

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

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

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

...

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

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

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

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

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

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

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

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

...

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

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

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

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

June 3, 2014

To Whom It May Concern:

I am writing this letter on behalf of Drs. Don and Molly Helms. We recently hired them through your firm to aide us in our search for a superintendent for the Winship-Robbins Elementary School District. The search started in mid March and concluded in late April with the successful hiring of Dr. Laurie Goodman.

Throughout the process Don and Molly Helms were professional, well informed, and organized. What started out as a seemingly daunting task proved to be efficient, manageable, and rather exhilarating. We felt the list of questions thoroughly covered our needs and the timeline was smooth. The advertising certainly attracted more applicants than we would have been able to accomplish on our own. Don and Molly also recruited which brought in one particularly good candidate. Their screening of applicants streamlined our job. We felt confident with their guidance and appreciated their commitment to helping us achieve our important goal.

We look forward to the new school year with the confidence that comes from feeling we have hired the right superintendent to serve the needs of our entire school community. Our sincere thanks go to Don and Molly for their valuable contribution.

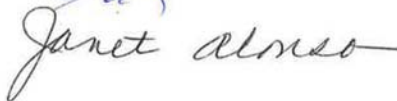
Sincerely,

Winship-Robbins Elementary School Board

Hassan Mohsen, President



Janet Alonso, Clerk





December 14, 2016

To Whom It May Concern;

I am writing this letter of recommendation for Teri Vigil of the McPherson and Jacobson Executive Recruitment and Development Firm.

Mrs. Vigil has provided excellent guidance and professionalism to our district during a rough time of transition. We are very appreciative of her work and her honest dedication to helping our district become the best it can be.

The Board of Trustees had hired a superintendent/principal on their own the year before who was not the right fit. His departure caused our district to fall apart. During the chaos, Mrs. Vigil was recommended to us by the County Superintendent of Schools and by another district in our county which had benefitted from her work.

She was immediately able to step in to provide a strong, confident voice to advise the board on how to move forward. She led the difficult conversations through stakeholder meetings to get to the basics about what the district needed in a new superintendent/principal.

The candidates she brought forward for final review and for interviews were impressive. Although it was a bit of a challenge to settle on just one, we have been very pleased with our new superintendent/principal. He was well prepared for the job and was able to step right into the district to take control.

I would recommend Mrs. Vigil and the firm of McPherson and Jacobson for other districts going through the process of hiring a new administrator. We could not have done it without her.

Thank you,

A handwritten signature in black ink that reads "Vanessa P. Vazquez". The signature is fluid and cursive.

Vanessa Vazquez
President, Board of Trustees
Fort Sage Unified School District

District Office (530) 827-2129 Ft. Sage Middle School/Herlong High School 827-2101 Sierra Primary School 827-2126

PO Box 35 ♦ 100 DS Hall ♦ Herlong, CA 96113 ♦ Fax (530) 827-3239

Applicant Diversity

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

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

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

<u>Search Year</u>	<u>School District/Entity</u>	<u>Person Placed</u>
2016-2017	Cold Spring School District, Santa Barbara, CA	Dr. Amy Alzina
2016-2017	New Haven Unified School Dist., CA	Dr. Arlando Smith
2016-2017	Carlsbad Municipal Schools, NM	Dr. Gregory Rodriquez
2016-2017	School District of Fort Atkinson, WI	Dr. Beverly Brown
2016-2017	Starkville Oktibbeha Consolidated School District, MS	Dr. Eddie Peasant
2016-2017	Richland School District, CA	Dr. Dagoberto Garcia
2015-2016	Oxnard Union High School Dist., CA	Ms. Penelope DeLeon
2015-2016	Alisal Union School District, CA	Dr. Hector Rico
2015-2016	Johnstonville Elem. School Dist., CA	Dr. Melanie Spears
2015-2016	East Dubuque School District, IL	Mrs. Tori Lindeman
2015-2016	Hemet Unified School District, CA	Ms. Christi Barrett
2015-2016	Ottumwa CSD, IA	Ms. Nichole Koolker
2015-2016	Charlotte-Mecklenburg Schools, NC	Dr. Clayton Wilcox
2015-2016	Rapid City Area School District, SD	Dr. Lori Simon
2015-2016	Francis Howell School District Saint Charles, MO	Dr. Mary Hendricks-Harris
2015-2016	Glendale Unified School District, CA	Mr. Winfred Roberson
2015-2016	Grand Island Public Schools, NE	Dr. Tawana Grover
2015-2016	Othello School District No. 147, WA	Dr. Kenneth Hurst
2014-2015	Penn Valley Union Elementary School District, CA	Dr. Torie England
2014-2015	Newcastle Elem. School District, CA	Ms. Denny Rush
2014-2015	Seattle Public Schools, WA (Director of Enrollment Planning)	Ms. Ashley Davies
2014-2015	Caney Valley USD 436, KS	Mr. Blake Vargas
2014-2015	Birmingham City Schools, AL	Dr. Kelley Gacutan
2014-2015	Cherokee Community School Dist., IA	Ms. Kimberly Lingenfelter
2014-2015	Chief Leschi Schools, Puyallup, WA	Dr. Amy Eveskcige
2014-2015	Colts Neck Township Schools, NJ	Ms. Mary Jane Garibay

2014-2015	Conejo Valley Unified School District Thousand Oaks, CA	Dr. Ann Bonitatibus
2014-2015	El Monte Union High School Dist., CA	Dr. Irella Perez
2014-2015	Gustine Unified School District, CA	Mr. William Morones
2014-2015	Hot Springs School District, AR	Mr. Mike Hernandez
2014-2015	San Juan Island School District Friday Harbor, WA	Dr. Danna Diaz
2014-2015	Sunnyside Unified School District Tucson, AZ	Mr. Steven Holmes
2014-2015	Unity Charter School, Morristown, NJ	Ms. Connie Sanchez
2014-2015	Watson Chapel School District Pine Bluff, AR	Dr. Connie Hathorn
2013-2014	Arkansas Arts Academy(Benton County School of Arts), AR	Mrs. Mary Ley
2013-2014	Caddo Parish Public Schools Shreveport, LA	Dr. Theodis Lamar Goree
2013-2014	Fallbrook Union High School District, CA	Dr. Hugo Pedroza
2013-2014	Gardner Public Schools, MA	Ms. Denise Clemons
2013-2014	Hermitage School District, AR	Dr. Tracy Tucker
2013-2014	Mary M. Knight School Dist., WA	Dr. Ellen Perconti
2013-2014	Winship-Robbins Elem. Schools, CA	Dr. Laurie Goodman
2013-2014	Valley Springs School Dist., AR	Ms. Judy Green
2012-2013	Clarke Comm. School District, IA	Ms. Bonita Gonzales
2012-2013	Eatonville School District, WA	Ms. Krestin Bahr
2012-2013	Galena Unit School District #120, IL	Dr. Sharon Olds
2012-2013	Goshen County School District Torrington, WY	Ms. Jean Chrostoski
2012-2013	Hot Springs School District, SD	Mrs. Danielle Root
2012-2013	Ladue Schools, St. Louis, MO	Dr. Donna Jahnke
2012-2013	Laguna Dept. of Education, NM	Mr. Emmanuel "David" Atencio
2012-2013	Little Rock School District, AR	Dr. Dexter Suggs
2012-2013	McCleary School District, WA	Ms. Tita Mallory
2012-2013	Santa Fe Indian School, NM	Mr. Roy Herrera
2012-2013	Texarkana School District, AR	Mrs. Becky Kesler