



**2021-22 Board of Directors**

**Board Chair, Alisha Oliver      Board Vice-Chair, Laura Wipper**

**Board Members:** Mike Wagner, Erin Cramer, Mark Henderson, Coral Ford & Mackenzie Strawn

**Student Representatives to the Board, Tayven Whieldon & Sarah Wolf**

**Superintendent, Andy Gardner**

**Assoc. Superintendent, Dave Bolin**

**Business Director, Jane Nofziger**

**Human Resources Director, Debi Brazelton**

**Superintendent/School Board Executive Assistant, Tonia Whisman**

**Special Session**

**Wednesday, February 9, 2022 ~ 6:00 PM**

**Virtual Meeting**

**Remotely Via Zoom**

**Stayton, OR 97383**

**NSSD VISION**

*We change kids' lives through a commitment to excellence, integrity, equity, and community engagement*

**NSSD MISSION STATEMENT**

*Ensure students reach their highest academic and vocational potential and develop into productive citizens*

**NSSD GUIDING PRINCIPLE**

*Do what is best for all kids*

**BOARD GOALS**

- 1) Offer the most comprehensive program possible for students and the appropriate staffing to support our commitment to doing what is best for all kids
- 2) Celebrate the successes of the District and community
- 3) Routinely monitor the effectiveness of District programs and services in order to better serve all kids
- 4) Build and sustain dynamic relationships with stakeholders of the District through proactive communication exchanges

1. **CALL SPECIAL SESSION TO ORDER**

*The Special Session of the North Santiam School District’s Board of Directors is called to order at 6:00 pm via Zoom. It is an open meeting of the Board and the public is allowed to observe virtually. The meeting has been called as a result of the NSSD’s current Superintendent tendering his resignation effective June 30, 2022.*

*There will be no public comment taken during this meeting, but questions may be submitted via this link QUESTIONS for a follow-up response. There will be public comment at the regular session meeting on February 17, 2022.*

Join Zoom Meeting <https://nsantiam-k12-or-us.zoom.us/j/84631149083> Meeting ID: 846 3114 9083  
Passcode: 984527

ACKNOWLEDGEMENT OF BOARD MEMBERS PRESENT: ALISHA OLIVER  
PLEDGE OF ALLEGIANCE: ALISHA OLIVER

2. **APPROVAL OF THE AGENDA**

Any changes to the agenda after posting on February 7, 2022 are noted below:

Added Attachments-

4.0-HYA Superintendent Search Proposal & BreakThrough Consulting LLC NSSD Proposal

Motion that the Board approves the meeting agenda as modified.

3. **DECLARATION OF VACANCY**

In order for a school district to begin the search process for a new superintendent, the position must be declared vacant.

Motion that the Board declares the position of Superintendent vacant as of July 1, 2022.

4. **SUPERINTENDENT SEARCH OPTIONS**

4

As of the date of posting, the District had received three proposals from superintendent search firms which were included. On the date of the meeting, two additional proposals were received and included in the meeting materials. The Board will discuss the proposals and possibly vote to hire one.

The Board will also discuss whether to meet again prior to the regularly scheduled meeting on February 17, 2022 to consult with the newly hired search firm.

Motion that Board elects to hire {search firm} for professional services related to a search for a new NSSD Superintendent for the 2022-2023 school year.

## 5. ADJOURN

### EQUAL OPPORTUNITY EMPLOYER

*Equal employment opportunity and treatment shall be practiced by the North Santiam School District regardless of an individual's perceived or actual race, color, religion, sex, sexual orientation, national or ethnic origin, marital status, age, mental or physical disability or perceived disability, pregnancy, familial status, economic status, veterans' status, or of any other persons with whom the individual associates is able to perform the essential functions of the position, with or without reasonable accommodation. This meeting location is accessible to persons with disabilities. A request for an interpreter for the hearing impaired or for other accommodations for persons with disabilities should be made at least 48 hours prior to the meeting. If you require special accommodations, please contact Tonia Whisman at the North Santiam School District Office at 503-769-4928.*



*A Proposal for Superintendent Search Consultant Services*

## **North Santiam School District**

Stayton, Sublimity, Lyons & Mehama, OR

**February 2, 2022**

*Example Proposal*

**Northwest Leadership Associates**

724 N Lancashire Ln  
Liberty Lake, WA 99019  
(509) 979-5561

dennisray@superintendentsearch.com

# Table of Contents

---

Proposal	3
Work plan	3 – 5
Search consultant team	6
Staff and community involvement	7
Leadership profile	7
Advertising and recruiting	7
Candidate screening	7
Background checks	7
Board-superintendent workshop	8
Cost	8
Guarantee	8
Preliminary search calendar	9
References	10
2021 Searches	11
Three-year NWLA search history	12-14
Resumes	15-19
Search Flow Chart	20

# Proposal for Search Services

---

Thank you for the opportunity to submit this proposal for assisting the North Santiam School District with the recruitment, selection, and employment of your next superintendent. This letter and the attached material will serve as Northwest Leadership Associates' proposal to serve as your search consultants for this important work. Details and final procedures of the search process will, of course, be developed in conjunction with the North Santiam Board of Directors and/or their designees.

## EXPERIENCE AND QUALIFICATIONS

Northwest Leadership Associates has conducted nearly 350 superintendent searches during our twenty years of service. We have also been the superintendent search consultants for six Washington and six Oregon educational service districts, and we recently conducted Executive Director searches for the Washington Association of School Administrators, the Washington State Retired Educators' Association, and the Washington Interscholastic Activities Association. A complete three-year search history for Northwest Leadership Associates is included in this proposal.

## WORK PLAN AND TIMELINE

We have worked hard to develop a culturally sensitive search protocol that finds the appropriate balance between meaningful involvement of key stakeholders, while maintaining the final decision-making authority of the Board. Our group will help the district provide meaningful interaction and involvement using different communication venues and languages in order to meet the specific needs of the district.

The following is a suggested work plan and timeline delineating the major activities and responsibilities of the School Board and Northwest Leadership Associates for each phase of the search.

**Note: The following description of activities applies to our typical search process. Obviously, significant adjustments may need to be made in light of the COVID-19 situation, and the related restrictions on public meetings. We will do everything possible to develop, in conjunction with the Board, a modified search process that is transparent and provides for meaningful public engagement while adhering to the current state guidelines**

## PHASE 1 - PREPARING FOR THE SEARCH

### Northwest Leadership Associates will:

- Meet with the Board to develop a tentative search plan and timeline.
- Obtain from Board members their perceptions of the required and preferred qualification criteria for the position and the personal characteristics and strengths being sought in candidates.
- Outline for the Board's consideration a variety of ways in which appropriate local school district personnel, staff and community members can be meaningfully involved in the search process.
- As requested, and/or approved by the Board, meet with selected individuals and groups obtain input regarding the qualification/selection criteria to be used by the Board in guiding its selection decision. These meetings will be conducted in Spanish, as requested.

## Example Proposal

- Synthesize the input received from all individual and group meetings and present the consolidated information to the Board for review in developing an initial draft of the recruitment brochure.
- Present to the Board developmental drafts of the recruitment brochure until approved by the Board for distribution.
- Review with the Board recruitment materials and strategies to be used in the search.

### **The School Board (or designee) will:**

- Approve the tentative search plan and timeline.
- Determine the process for the involvement of community, staff, students, and other stakeholders in the search process.
- Provide NWLA with background information regarding the district for use in candidate recruitment.
- Respond to preliminary drafts and approve for printing the final draft of the recruitment brochure.
- Approve other recruitment strategies and advertising of the opening.
- Based on the salary study and contract review and the recommendation of the consultants, approve a potential compensation package and talking points regarding compensation that NWLA consultants can use when recruiting candidates.

## **PHASE 2 - RECRUITING AND SCREENING CANDIDATES**

### **Northwest Leadership Associates will:**

- Place recruitment announcements on selected internet web sites.
- Using a wide-ranging network, contact school administrators, ESD superintendents, college professors, representatives of professional associations, and other individuals who can assist with identifying qualified applicants who should be encouraged to seek the position.
- Through personal contacts, encourage selected potential candidates to apply for the position.
- Respond to applicant questions about the position.
- Receive and acknowledge all applications and establish a confidential file for each candidate.
- Conduct preliminary reference screening for all qualified applicants.
- Report to the Board the results of the application/screening process and review with the Board all the application files. Identify the leading candidates, as well as those who are not recommended for further consideration, and give reasons for that decision.
- Assist the Board in selecting candidates to be invited to interview for the position.

### **The School Board (or designee) will:**

- Approve recruitment strategies and advertising for the position.
- Receive the comprehensive screening report from NWLA.
- Review all application files. Discuss the relative merits of the candidates in relationship to the selection criteria.
- Select candidates to be invited to interview for the position.
- Conduct additional reference checks, as needed, on those candidates invited for interviews.

### **PHASE 3 - INTERVIEWING CANDIDATES**

**Northwest Leadership Associates will:**

- Provide the Board with sample interview questions and a suggested interview format.
- Advise the Board on options for including advisory groups, bilingual if requested, in the interview process.
- Assist with scheduling and arranging interviews with the selected candidates.
- Conduct further background checks for candidates still under consideration, as requested by the Board.
- At the conclusion of the interview process, meet with the Board to assist in the evaluation of candidates.
- Provide the Board with a suggested format for the finalists' visits to the district and additional final interview strategies.

**The School Board (or designee) will:**

- Arrange for the participation of any advisory groups invited to participate in the interview process.
- Approve interview format and final draft of interview questions.
- Conduct interviews with selected candidates.
- In consultation with NWLA, evaluate candidates following the interviews and select candidate(s) to be visited and/or invited for additional interview(s).
- Conduct site visits and/or second interviews as deemed necessary by the Board.

### **PHASE 4 - MAKING THE SELECTION AND CLOSING THE DEAL**

**Northwest Leadership Associates will:**

- Meet with the board to define any additional information needed before reaching a decision.
- Assist the Board with contract negotiations with selected candidate, including making appropriate recommendations to the Board regarding contract terms.
- Notify candidates not selected for the position.

**The School Board (or designee) will:**

- Review all input from groups and individuals that have met with the candidates.
- Make site visit(s), if needed, prior to making final decision.
- Determine which candidate should be offered the position.
- With NWLA assistance, negotiate a mutually acceptable contract with the selected candidate.
- Make appropriate announcements to the staff, community, and the media.

## SEARCH CONSULTANT TEAM

If Northwest Leadership Associates is selected, **Dr. Rebecca Miner and Mr. Mark Hattowe** will be the primary consultant team for the Mercer Island superintendent search. **Mark** will be the primary search lead and work directly with the Board Chair, Board of Directors, and any district designees. **Mark** is the former Superintendent of the Battle Ground and Ocean Beach School Districts, and is currently a board member on the ESD 112 Board of Directors. **Rebecca** is the former Superintendent of the Shoreline and White Pass School Districts, and is also an adjunct faculty member of Washington State and Western Washington State Universities. Other team members may be asked to provide help specific help depending on accomplishing timeline objectives effectively and efficiently (**Mr. Sergio Hernandez, Dr. Tom Rockefeller, Dr. Pam Veltri**). All NWLA associates are involved in both searching and identifying appropriate candidates through shared individual and group resources, as well as professional and personal connections.

### NWLA Associates

---

#### **Dr. Dennis Ray, President**

- President and Owner of Northwest Leadership Associates
- Former Superintendent of the Walla Walla and Northshore School Districts

#### **Sergio Hernandez, NWLA Associate**

- Former Superintendent of the Tekoa, Freeman and Kahlotus School Districts
- Executive Director, WA Association of Latino Administrators and Superintendents

#### **Mark Hottowe, NWLA Associate**

- Former Superintendent of the Ocean Beach and Battle Ground School Districts
- Educational Service District 112 Board of Directors

#### **Dr. James Howard, NWLA Associate**

- Former Director of WSU's Principal Certification Program
- Former Superintendent of the Davenport School District

#### **Dr. William Jordan, NWLA Associate**

- Former Superintendent of the Walla Walla, Prescott, and Kelso School Districts
- Former Deputy Superintendent of Public Instruction for Washington State

#### **Dr. Rebecca Miner, NWLA Associate**

- Former Superintendent of the Shoreline and White Pass School Districts
- Adjunct Faculty member at Washington State and Western Washington Universities

#### **Dr. Wayne Robertson, NWLA Associate**

- Former Superintendent of the Edmonds, Lakewood and Conway School Districts
- Faculty member in Western Washington University Educational Leadership Program

#### **Dr. Pam Veltri, NWLA Associate**

- Former Superintendent of the Medical Lake School District
- Faculty member in Eastern Washington University Educational Leadership Program

#### **Mark Venn, NWLA Associate**

- Former Superintendent of the Sedro-Woolley School District
- Educational Service District 189 Board member

#### **Dr. Thomas Rockefeller, Chief Operating Officer**

- Former Superintendent of the Mead and Pullman School Districts
- Former adjunct member of WSU's Educational Leadership Program

## **STAFF AND COMMUNITY INVOLVEMENT**

We will initiate the search by conducting an on-line survey and holding focus group sessions with staff, community members, and other key stakeholder groups, in Spanish if appropriate, to gather input on the needs of the district and the criteria that should be used in recruiting candidates and making the final selection.

## **LEADERSHIP PROFILE**

The Leadership Profile developed at the outset of the search process becomes the guiding document in evaluating candidates and making the final selection decision. As indicated in the search outline, we will facilitate the development of the leadership profile through:

- conducting an on-line survey, in both English and Spanish, inviting input from all interested staff and community members,
- holding focus group meetings, in both English and Spanish, with key stakeholder groups, including both community members and district staff, and
- meeting individually with each board member

Based upon this input we will create a draft of the leadership profile and selection criteria for the review, revision, and approval of the Board of Directors.

## **ADVERTISING AND RECRUITING PLAN**

We will develop a vacancy announcement for the position that outlines the leadership challenges and selection criteria identified by the Board, along with a profile of the district and other information of importance to prospective candidates. We will email the brochure to over three thousand school districts and individuals in our database, which includes superintendents, assistant superintendents, university professors, and professional association executives. We will list the opening on appropriate websites, including AASA (national school superintendents organization), the Washington State School Directors and Washington Association of School Administrators, AWSP, as well as district designated advertising sites.

One of our associates, Sergio Hernandez, is the Executive Director of the Washington Association of Latino Administrators and Superintendents. We will list the opening on their websites, as well as their companion organizations in other states. We will reach out to a variety of other groups representing diverse and under-represented groups to secure a widely representative pool of candidates for the position.

***Most important, we will conduct aggressive one-to-one recruiting efforts with individuals we believe are highly qualified candidates for the position.***

## **CANDIDATE ANALYSIS AND SCREENING**

Northwest Leadership Associates will conduct preliminary reference checks on all qualified candidates. We will contact references identified by the candidate and, more importantly, other individuals who are familiar with the candidate's past work. Once the field of candidates has been narrowed to those to be invited for interviews, we will encourage Board members to make additional reference checks.

## **FINAL BACKGROUND CHECKS**

As the field of candidates is narrowed to finalists for the position, we will facilitate criminal background checks on those still under consideration. Although it is highly unlikely that these checks will reveal any previously unknown information, we believe it is a wise "due diligence" investment. This is included at no additional cost to the district. We will also work with the school board in conducting more extensive professional background checks on the finalists.

## **BOARD-SUPERINTENDENT WORKSHOP**

At the request of the Board, we will conduct a three-hour board-superintendent workshop during the 2022-2023 school year as part of the services provided under this proposal. The proposed workshop will focus on clarification of respective roles and responsibilities, effective team-building strategies, and identification of the Board's expectations for the superintendent. The only additional expense to the district for this workshop would be the consultant travel to the district.

## **COST**

Our preliminary cost proposal, based on the scope of services outlined in this proposal, is sixteen thousand three hundred dollars (\$14,300), plus reimbursement for agreed upon expenses. The only anticipated expenses will consist of consultant travel to the district and the cost of advertising on national websites. The fee will be due upon the employment of the new superintendent.

## **GUARANTEE**

If no acceptable candidate is identified, or the selected superintendent resigns the position or is dismissed by the Board for cause during the first two years of his/her employment, Northwest Leadership Associates will conduct a comparable search for a replacement without charge other than reimbursement for appropriate expenses.

We appreciate your consideration of our proposal and look forward to the opportunity to meet with the Board to discuss our proposal and the details of the proposed search process. We can be contacted at the following phone numbers or email addresses. Thank you for your consideration of our proposal; we look forward to hearing from you.

## **Dennis Ray**

President, Northwest Leadership Associates  
509.979.5561  
[dennisray@superintendentsearch.com](mailto:dennisray@superintendentsearch.com)

## **Tom Rockefeller**

Tom Rockefeller, CEO/Associate  
509.590.8453  
[trockefeller@superintendentsearch.com](mailto:trockefeller@superintendentsearch.com)

## North Santiam School District Superintendent Search Calendar 2021-2022 Suggested

*(Draft – final calendar to be developed in conjunction with the Board)*

<sup>Draft</sup> <b>February __, 2022 Board Meeting</b>	<b>Board approves search plan and timeline Pre Announcement posted</b>
<b>February __, 2022</b>	<b>Position description and leadership profile survey, in both English and Spanish on web</b> <ul style="list-style-type: none"> <li>• <i>Provides for input from all stakeholders and community</i></li> </ul>
<b>February __, 2022</b>	<b>Focus group meetings with stakeholders selected by Board</b>
<b>March __, 2022 Board Meeting</b>	<b>Focus group report to Board by NWLA</b>
<b>March __, 2022 Board Meeting</b>	<b>Brochure completed and emailed to 3000+ nationwide</b>
<b>April __, 2022</b>	<b>Mid-search report / preparation for interview phase</b>
<b>April __, 2022</b>	<b>Application deadline</b>
<b>April __, 2022</b>	<b>Screening report to board</b> <ul style="list-style-type: none"> <li>• <i>Executive Session with board and NWLA consultants</i></li> <li>• <i>Select 5-6 candidates to be invited for preliminary interviews</i></li> </ul>
<b>April __, 2022</b>	<b>Preliminary interviews</b> <ul style="list-style-type: none"> <li>• <i>50 minute interviews, with 10 minute break between</i></li> <li>• <i>Questions to be developed by NWLA; revised by board</i></li> <li>• <i>Executive Session to follow last interview to select finalists</i></li> </ul>
<b>May __, __, 2022</b>	<b>Final interviews</b> <i>Schedule to be developed, but will include:</i> <ul style="list-style-type: none"> <li>• <i>Meetings with community and staff</i></li> <li>• <i>Interview with superintendent and Board in Executive Session</i></li> <li>• <i>Format to be developed by NWLA, and approved by board</i></li> </ul>
<b>May __, 2022</b>	<b>Announcement of final selection</b> <ul style="list-style-type: none"> <li>• <i>Final background checks</i></li> <li>• <i>Contract negotiations</i></li> </ul>
<b>May __, 2022</b>	<b>Contract to be offered</b> <ul style="list-style-type: none"> <li>• <i>Offer to be pre-negotiated by consultant</i></li> </ul>
<b>June-July __, 2022</b>	<b>Selected superintendent assumes position</b>

## **Northwest Leadership Associates**

*selected references for the  
North Santiam School District*

<b>Year</b>	<b>District/agency</b>	<b>Enroll</b>	<b>Selected Candidate (prior position)</b>	<b>Contact</b>
2021	<i>Raymond School District, Raymond WA</i>	540	<i>Ross Baker Superintendent, Emerson Academy</i>	<i>Ron Bell Board Chair <a href="mailto:konnibell@gmail.com">konnibell@gmail.com</a> (360) 942-3415</i>
2021	<i>Elma School District, Elma, WA</i>	1,500	<i>Chris Nesmith Executive Director of Innovation, West Valley School District</i>	<i>Bernadette Bower Board Chair <a href="mailto:bbower@eagles.edu">bbower@eagles.edu</a> (360) 482-2822</i>
2021	<i>East Valley School Dist. Spokane Valley, WA</i>	4,000	<i>Brian Talbott Superintendent Nine Mile Falls School District</i>	<i>Justin Voelker Board President (509) 413-2628</i>
2021	<i>Wahluke Sch. Dist. Mattawa, WA</i>	2,600	<i>Andy Harwood Interim Superintendent Wahluke School District</i>	<i>Lorraine Jenne Board President <a href="mailto:ljenne@wahluke.net">ljenne@wahluke.net</a></i>
2021	<i>Peninsula Sch. Dist. Gig Harbor, WA</i>	9,000	<i>Krestin Bahr Superintendent Eatonville School District</i>	<i>David Olson Board President (253) 678-4904</i>
2021	<i>Sedro-Woolley Sch. Dist. Sedro-Woolley, WA</i>	4,200	<i>Miriam Mickelson Executive Director Snohomish School District</i>	<i>Christina Jepperson Board President (206) 714-1902</i>
2020	<i>Anacortes School District Anacortes, WA</i>	2,800	<i>Justin Irish Assistant Superintendent Edmonds School District</i>	<i>Bobbilyn Hogge Board member (360) 708-9128</i>
2020	<i>Mount Vernon School District Mount Vernon, WA</i>	6,910	<i>Ismael Vivanco Superintendent Orondo School District</i>	<i>Larry Otos Board member (360) 333-4171</i>

### **2021 Superintendent Search Results**

<i>District</i>	<i>Selected</i>	<i>Student fte</i>	<i>From</i>	<i>Previous Position</i>
<i>East Valley Spokane</i>	<i>Brian Talbot</i>	<i>4000</i>	<i>Nine-mile Falls</i>	<i>Superintendent</i>
<i>Elma</i>	<i>Chris Nesmith</i>	<i>1600</i>	<i>West Valley</i>	<i>Executive Director</i>
<i>Glenwood</i>	<i>Greg Rayl</i>	<i>70</i>	<i>American International School, Lagos, Nigeria</i>	<i>Superintendent</i>
<i>Jefferson County Madras, OR</i>	<i>Jay Mathisen</i>	<i>3000</i>	<i>George Fox University Newburg, OR</i>	<i>Director of Ed. Leadership</i>
<i>LaConner</i>	<i>Will Nelson</i>	<i>600</i>	<i>Arlington</i>	<i>Director of Equity</i>
<i>Liberty</i>	<i>Jerrad Jeske</i>	<i>560</i>	<i>Rainier</i>	<i>Vice Principal</i>
<i>Lopez Island</i>	<i>Ed Murray</i>	<i>225</i>	<i>Fountain Inn, South Carolina</i>	<i>Director</i>
<i>Mossyrock</i>	<i>Larry Markuson</i>	<i>510</i>	<i>White Sulphur Springs Montana</i>	<i>Superintendent</i>
<i>Orting</i>	<i>Bill Hatzenbeler</i>	<i>2700</i>	<i>Enumclaw</i>	<i>Director of Business &amp; Operations</i>
<i>Peninsula</i>	<i>Krestin Bahr</i>	<i>9200</i>	<i>Eatonville</i>	<i>Superintendent</i>
<i>Raymond</i>	<i>David Baker</i>	<i>529</i>	<i>Emerson Academy Mount Vernon</i>	<i>Superintendent</i>
<i>Sedro-Woolley</i>	<i>Mirian Mickelson</i>	<i>4500</i>	<i>Snohomish</i>	<i>Executive Director</i>
<i>Stanwood- Camano</i>	<i>Deborah Rumbaugh</i>	<i>4800</i>	<i>Highline</i>	<i>Executive Director</i>
<i>Wahluke</i>	<i>Andy Harlow</i>	<i>2400</i>	<i>Wahluke</i>	<i>Interim Superintendent</i>
<i>White Salmon Valley</i>	<i>Sean McGeeney</i>	<i>1250</i>	<i>Yakima</i>	<i>Executive Director</i>

**Northwest Leadership Associates**  
**Three-Year Superintendent Search History (2019 – 2021)**

<b>Year</b>	<b>District/agency</b>	<b>Selected Candidate (prior position)</b>	<b>Current status of selection</b>
2021	East Valley School District Spokane Valley, WA 4,000 fte	Brian Talbot Superintendent Nine Mile Falls School District	Continues to serve in position
2021	Elma School District Elma, Washington 1,600 fte	Chris Nesmith Executive Director West Valley School District	Continues to serve in position
2021	Glenwood School District Glenwood, Washington 70 fte	Greg Rayl Superintendent Amer. International School	Continues to serve in position
2021	Jefferson County School District Madras, Oregon 3,000 fte	Jay Mathison Program Director George Fox University	Continues to serve in position
2021	LaConner School District LaConner, Washington 600 fte	Brian Talbot Superintendent Nine Mile Falls School District	Continues to serve in position
2021	Liberty School District Spangle, Washington 560 fte	Jerrad Jeske Assistant Principal Rainier School District	Continues to serve in position
2020	Lopez Island Schools Lopez, Washington 225 fte	Ed Murray Director Fountain Inn, S.D.	Continues to serve in position
2021	Mossyrock School District Mossyrock, Washington 510 fte	Larry Markuson Superintendent White Sulphur Springs, MT	Continues to serve in position
2021	Orting School District Orting, Washington 2,700 fte	Bill Hatzenbeler Director Enumclaw School District	Continues to serve in position
2021	Peninsula School District Gig Harbor, Washington 9,200 fte	Krestin Bahr Superintendent Eatonville Falls School District	Continues to serve in position
2021	Raymond School District Raymond, Washington 529 fte	David Baker Superintendent Emerson Academy	Continues to serve in position
2021	Sedro-Woolley School District Sedro-Woolley, WA 4,500 fte	Mirian Mickelson Executive Director Snohomish School District	Continues to serve in position
2021	Stanwood-Camano Schools Stanwood, Washington 4,800 fte	Deborah Rumbaugh Executive Director Highline Falls School District	Continues to serve in position

Example Proposal

2021	<b>Wahluke School District Mattawa, WA 2,400 fte</b>	<b>Andy Harlow Interim Superintendent Wahluke Falls School District</b>	<b>Continues to serve in position</b>
2021	<b>White Salmon Valley School White Salmon, WA 1,250 fte</b>	<b>Sean McGeeney Executive Director Yakima School District</b>	<b>Continues to serve in position</b>
2020	<b>Enumclaw School District Enumclaw Washington 4,100 fte</b>	<b>Shaun Carey Assistant Superintendent Franklin Pierce School District</b>	<b>Continues to serve in position</b>
2020	<b>Hood Canal School District Shelton, Washington 320 fte</b>	<b>Nikki Cannon Interim Superintendent Hood Canal School District</b>	<b>Continues to serve in position</b>
2020	<b>Klickitat School District Klickitat, Washington 70 fte</b>	<b>Brian Freeman Interim Superintendent Klickitat School District</b>	<b>Continues to serve in position</b>
2020	<b>Mary M. Knight School District Shelton, Washington 1,050 fte</b>	<b>Matt Mallery Executive Director Grandview School District</b>	<b>Continues to serve in position</b>
2020	<b>Mossyrock School District Mossyrock, Washington 550 fte</b>	<b>Glenn Malone Executive Director Puyallup School District</b>	<b>Interim Appointment</b>
2020	<b>Mount Vernon School District Mount Vernon, Washington 6,800 fte</b>	<b>Ismael Vivanco Superintendent Orondo School District</b>	<b>Continues to serve in position</b>
2020	<b>Omak School District Omak, Washington 5,500 fte</b>	<b>Michael Porter Assistant Superintendent Omak School District</b>	<b>Continues to serve in position</b>
2020	<b>Pioneer School District Shelton, Washington 90 fte</b>	<b>John Gummel Principal Kelso School District</b>	<b>Continues to serve in position</b>
2020	<b>Puyallup School District Puyallup, Washington 23,100 fte</b>	<b>John Polm Superintendent Port Townsend School District</b>	<b>Continues to serve in position</b>
2020	<b>Stevenson-Carson School Dist Stevenson, Washington 910 fte</b>	<b>Ingrid Colvard Principal Woodland School District</b>	<b>Continues to serve in position</b>
2020	<b>Woodburn School District Woodburn, Oregon 5,700 fte</b>	<b>Oscar Gilson Director Portland School District</b>	<b>Continues to serve in position</b>
2019	<b>Clarkston School District Clarkston, Washington 2,700 fte</b>	<b>Thaynan Knowlton Superintendent Kettle Falls School District</b>	<b>Continues to serve in position</b>
2019	<b>Cle Elum-Roslyn School District Cle Elum, Washington 910 fte</b>	<b>Michelle Kuss-Cybula Principal Bellingham School District</b>	<b>Continues to serve in position</b>

Example Proposal

2019	Ephrata School District Ephrata, Washington 2,600 fte	Tim Payne Superintendent College Place School District	Continues to serve in position
2019	Hockinson School District Hockinson, Washington 2,000 fte	Steve Marshall District of Ed Resouces Camas School District	Continues to serve in position
2019	Kennewick School District Kennewick, Washington 18,500 fte	Traci Pierce Director Lake Washington School Dist	Continues to serve in position
2019	Lakewood School District Lakewood, Washington 2,450 fte	Scott Peacock Deputy Superintendent Snohomish School District	Continues to serve in position
2019	Lyle School District Lyle, Washington 230 fte	Ann Varkados Assistant Superintendent Bethel School District	Continues to serve in position
2019	Mead School District Mead, Washington 10,300 fte	Shawn Woodward Superintendent Lake Pend Oreille School Dist	Continues to serve in position
2019	Naches Valley School District Naches, Washington 1,310 fte	Robert Bowman Principal Zillah School District	Continues to serve in position
2019	Ocean Beach School District Long Beach, Washington 1,050 fte	Amy Huntley Administrator Ocean Beach School District	Continues to serve in position
2019	South Kitsap School District Port Orchard, Washington 9,900 fte	Tim Winter Superintendent Clarkston School District	Continues to serve in position
2019	Waitsburg School District Waitsburg, Washington 285 fte	Mark Pickel Principal Walla Walla School District	Continues to serve in position
2019	Yakima School District Yakima, Washington 16,200 fte	Trevor Greene Executive Director Highline School District	Continues to serve in position
2019	South Kitsap School District Port Orchard, Washington 9,900 fte	Tim Winter Superintendent Clarkston School District	Continues to serve in position
2019	Waitsburg School District Waitsburg, Washington 285 fte	Mark Pickel Principal Walla Walla School District	Continues to serve in position
2019	Yakima School District Yakima, Washington 16,200 fte	Trevor Greene Executive Director Highline School District	Continues to serve in position

# G. MARK HOTTOWE

## NORTHWEST LEADERSHIP ASSOCIATES

---

 (360) 431-0950 (cell) | (360) 636-0753 (home)

 [m.hottowe@superintendentsearch.com](mailto:m.hottowe@superintendentsearch.com)

 213 Stella Rd | Longview, WA 98632

### PROFESSIONAL HISTORY

- 2014 – 2017 Superintendent, Battle Ground School District, Battle Ground, WA
- 2011 – 2014 Superintendent, Ocean Beach School District, Long Beach, WA
- 2007 – 2011 Executive Director, Supervision, Human Resources and Student Services  
Kelso School District, Kelso WA
- 2004 – 2007 Director of Student Services, Kelso School District, Kelso WA

#### Other Professional Experience

- Elementary and Middle School Principal, Kelso School District, Kelso, WA
- Middle School Principal, Longview School District, Longview, WA
- Middle School Assistant Principal, Sumner School District, Sumner, WA
- Teacher and Federal Indian Education Coord., Central Kitsap School District, Silverdale, WA
- Teacher Cape Flattery School District, Neah Bay, WA

### EDUCATION

Superintendent Credential	Washington State University
Master of Education	Central Washington University
Administrative Credential	Central Washington University
Bachelor of Arts	Dartmouth College
Elem/Sec Teaching Credential	Dartmouth College

# REBECCA MINER

## NORTHWEST LEADERSHIP ASSOCIATES

---

 (360) 609-5941 (Cell) (360) 992-8092 (Home)

 Rebecca.miner@comcast.net

 4515 NW Lavina St. | Vancouver, WA 98663

### PROFESSIONAL HISTORY

- 2021 - present WASA Inclusionary Practices Project Lead
- 2021 Adjunct Professor for Washington State University Vancouver Principal Program
- 2021 Adjunct Professor for Western Washington University Superintendent Program
- 2014 - 2021 Superintendent – Shoreline School District, Shoreline, Washington
- 2011 - 2014 Superintendent – White Pass School District, Randle, Washington
- 2007 - 2011 Assistant Superintendent  
Washougal School District, Washougal, Washington
- 2005 - 2007 Special Services Administrator for Secondary Programs  
Vancouver School District, Vancouver, Washington
- 2001 - 2005 Associate Principal – Vancouver School District, Vancouver, Washington
- 1992 - 2001 Teacher  
Vancouver and Kelso School Districts and Our Lady of Lourdes  
Vancouver, Washington and Kelso, Washington

### EDUCATION

- Ed.D. Washington State University Vancouver (2016)
- MAT Willamette University (1992)
- B.A. Lake Forest College (1990)

Superintendent’s Endorsement, Washington State University (2008)

Principal’s Endorsement/Certification, City University (2000)

Washington Standard/Continuing Teacher Certificate (1992)

# SERIGO HERNANDEZ

## NORTHWEST LEADERSHIP ASSOCIATES

---

 (509) 389-3940

 [s.hernandez@superintendentsearch.com](mailto:s.hernandez@superintendentsearch.com)

 611 Country Club Rd | Walla Walla, WA 99362

### PROFESSIONAL HISTORY

Washington Association of Latino Administrators and Superintendents  
Executive Director and Business Development Specialist - Founding member

2013 - present    Equity and Access Coordinator  
Walla Walla School District, Walla Walla, WA

1999 - 2014      Superintendent of Schools - Freeman, Tekoa and Kahlotus School Districts

1991 - 1999      Federal Programs Director - Walla Walla School District, Walla Walla, WA

1982 - 1991      Administrator - Walla Walla University, College Place, WA

1969 - 1982      Teacher and Administrator - Seventh-day Adventist Church

### EDUCATION

Superintendent Credential      Washington State University (1997)

Ed.D. - ABD status              Ed. Specialist - Bilingual Education  
Wichita State University, Wichita, KS (1980)

M.Ed.                                  Pacific Union College, Angwin, CA (1973)

B.A.                                      Pacific Union College, Angwin, CA (1969)

# PAMELA VELTRI

## NORTHWEST LEADERSHIP ASSOCIATES

---

 (509) 710-1402

 [p.veltri@superintendentsearch.com](mailto:p.veltri@superintendentsearch.com)

 14101 N Copper Canyon Lane, Spokane, WA 99208

### PROFESSIONAL HISTORY

2019 - Present	Director - Educational Leadership Program - EWU
2014 - 2019	Assistant Superintendent - Mead School District, Mead, WA
2000 - 2014	Superintendent - Medical Lake School District, Medical Lake, WA
2012 & 2013	Adjunct Professor Graduate Studies, Whitworth University
2012 - Present	Adjunct Professor Graduate Studies, Eastern Washington University
1999 - 2000	Assistant Superintendent - Medical Lake School District, Medical Lake, WA
1996 - 1999	Director Student Services & Curriculum, Medical Lake School District
1992-1996	Director of Curriculum & Instruction - Newport School District, Newport, WA
1990-1992	Director Special Services - Newport School District, Newport, WA
1988-1990	Director of Secondary Special Svcs - Newport School District, Newport, WA
1983-19858	Teacher - Newport Jr./Sr. High School, Newport, WA
1982-1983	Special Education Teacher - Wallace School District, Wallace, ID

### EDUCATION

Doctor of Philosophy in Education, University of Idaho (2001)

Specialist in Educational Administration, University of Idaho (1994)

Master of Arts in Supervision, Curriculum & Instruction, Gonzaga University (1992)

Master of Education in Special Education Administration, University of Idaho (1986)

Bachelor of Education Gonzaga University, Graduated summa cum laude (1982)

# THOMAS J. ROCKEFELLER

NORTHWEST LEADERSHIP ASSOCIATES CHIEF OPERATING OFFICER

---

☎ (509) 590-8453

✉ [trockefeller@superintendentsearch.com](mailto:trockefeller@superintendentsearch.com)

✉ rockfellertom34@gmail.com

🏠 11417 Lloyd Charles Lane | Spokane, WA 99218

## PROFESSIONAL HISTORY

- 2006 - 2019 Superintendent - Mead School District, Mead, Washington
- 2000 - 2006 Superintendent - Pullman Public Schools, Mead, Washington
- 1998 - 1999 Executive Director of Curriculum and Instruction  
Ridgefield Public Schools. Ridgefield, Washington
- 1992 - 1999 Principal - View Ridge Middle School, Ridgefield School District
- 1978 - 1992 Teacher - Ridgefield School District, Ridgefield, Washington

## EDUCATION

- Ed.D. Portland State University (1990)
- M.Ed. University of Portland (1981)
- B.S.E. University of Kansas (1978)

Superintendent's Endorsement, Washington State University (1998)

Washington Continuing Superintendent's Certificate, Washington State University (1998)

Principal's Endorsement/Certification, Washington State University (1991)

Washington Continuing Administrative Certificate, Washington State University (1989)

Principal's Endorsement/Certification, Portland State University (1985)

Washington Standard/Continuing Teacher Certificate (1980)

## PAST PROFESSIONAL INVOLVEMENT (SELECTED):

**WASA Executive Board member**

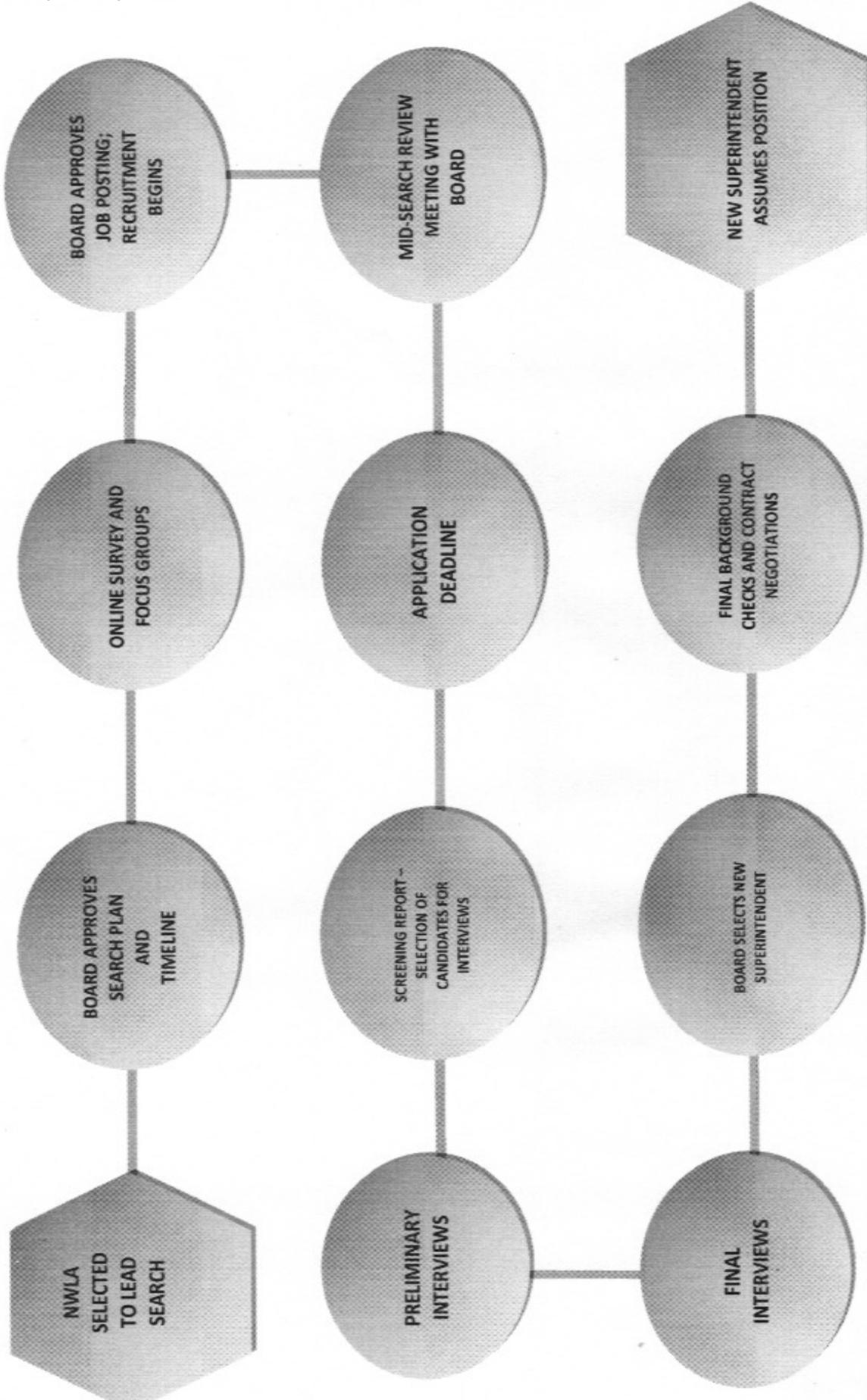
**WIAA Superintendents Advisory Council**

**Board of Trustees, Greater Spokane Incorporated (Chamber of Commerce)**

**President, Pullman Chamber of Commerce**

**Adjunct Professor, Washington State University, School Finance and Public Admin.**

# NWLA Superintendent Search Flow Chart



*A Proposal Prepared for*

# **North Santiam School District Stayton, Oregon**

*for*

*The Search and Selection of a  
Superintendent of Schools*

*submitted by*

**MCPHERSON  JACOBSON, LLC**

EXECUTIVE RECRUITMENT & DEVELOPMENT



11725 Arbor Street, Suite 220  
Omaha, Nebraska 68144  
Phone: 888-375-4814/402-991-7031  
Fax: 402-991-7168  
Email: [mail@macnjake.com](mailto:mail@macnjake.com)  
Website: [www.macnjake.com](http://www.macnjake.com)





**MCPHERSON & JACOBSON, LLC**

**EXECUTIVE RECRUITMENT & DEVELOPMENT**

11725 ARBOR STREET, SUITE 220 ♦ OMAHA, NEBRASKA 68144 ♦ 402-991-7031/888-375-4814  
FAX: 402-991-7168 ♦ EMAIL: [MAIL@MACNJAKE.COM](mailto:MAIL@MACNJAKE.COM) ♦ WEBSITE: [WWW.MACNJAKE.COM](http://WWW.MACNJAKE.COM)

February 2, 2022

Board of Directors  
North Santiam School District  
1155 N. 3<sup>rd</sup> Ave.  
Stayton, Oregon

Thank you for your request for information. The enclosed proposal describes the professional services McPherson & Jacobson, L.L.C. will provide North Santiam School District in ensuring your superintendent search secures quality leadership for the district.

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

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

With over 125 consultants across the United States, McPherson & Jacobson has been successfully conducting searches for governing boards since 1991.

Our contact information:

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

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

Sincerely,

McPherson & Jacobson L.L.C.

# **TABLE OF CONTENTS**

<i>About McPherson &amp; Jacobson</i> .....	3
<i>The McPherson &amp; Jacobson Difference</i> .....	3
<i>Qualifications and Background of McPherson &amp; Jacobson, L.L.C.</i> .....	3
<i>McPherson &amp; Jacobson, L.L.C. Equity Policy</i> .....	4
<i>Applicant Diversity</i> .....	5
<i>Search Process</i> .....	6
<i>Executive Summary</i> .....	6
<i>Five Phases of a Superintendent Search</i> .....	7
<i>Phase I—Initiating the Search Process</i> .....	8
<i>Phase II—Stakeholder Input, Advertising the Position, Recruiting Applicants</i> .....	8
<i>Phase III—Applicant Screening</i> .....	10
<i>Phase IV—Reviewing Candidates with the Board, Interviews</i> .....	11
<i>Phase V—Transition with Success</i> .....	13
<i>Timeline</i> .....	14
<i>Responsibilities of North Santiam School District and</i> <i>McPherson &amp; Jacobson, L.L.C.</i> .....	15
<i>Stakeholder Involvement</i> .....	18
<i>Cost Proposal</i> .....	20
<i>Investment</i> .....	20
<i>Additional Information</i> .....	22
<i>McPherson &amp; Jacobson, L.L.C. Consultants</i> .....	22
<i>McPherson &amp; Jacobson’s Superintendent Searches for Oregon School Districts</i> .....	27
<i>What Board Members Say About McPherson &amp; Jacobson’s Search Services</i> .....	28

This proposal is the property of McPherson & Jacobson L.L.C. and has been prepared at the request of the North Santiam School District, Stayton, Oregon. The contents of this proposal are not to be reproduced or distributed for any reason other than for use by the North Santiam School District, Stayton, Oregon.

02/22



## *About McPherson & Jacobson*

### *The McPherson & Jacobson Difference*

#### ***“It’s About the Kids”***

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

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

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

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

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

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 870 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 125 consultants** across the nation. Over one-fourth of McPherson & Jacobson consultants are minorities or female. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensures your search results in quality leadership for education excellence.

## Sustainability in Leadership

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

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

### *McPherson & Jacobson, L.L.C. Equity Policy*

McPherson & Jacobson, L.L.C. is dedicated to serving school districts through an equity lens that supports all candidates regardless of cultural and ethnic diversity. In order to achieve this, we must embrace a culture of inclusion and acceptance.

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

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

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

## *Applicant Diversity*

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

McPherson & Jacobson has **over 125 consultants** across the nation. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensures your search results in quality leadership for education excellence.

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

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

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

## *Search Process*

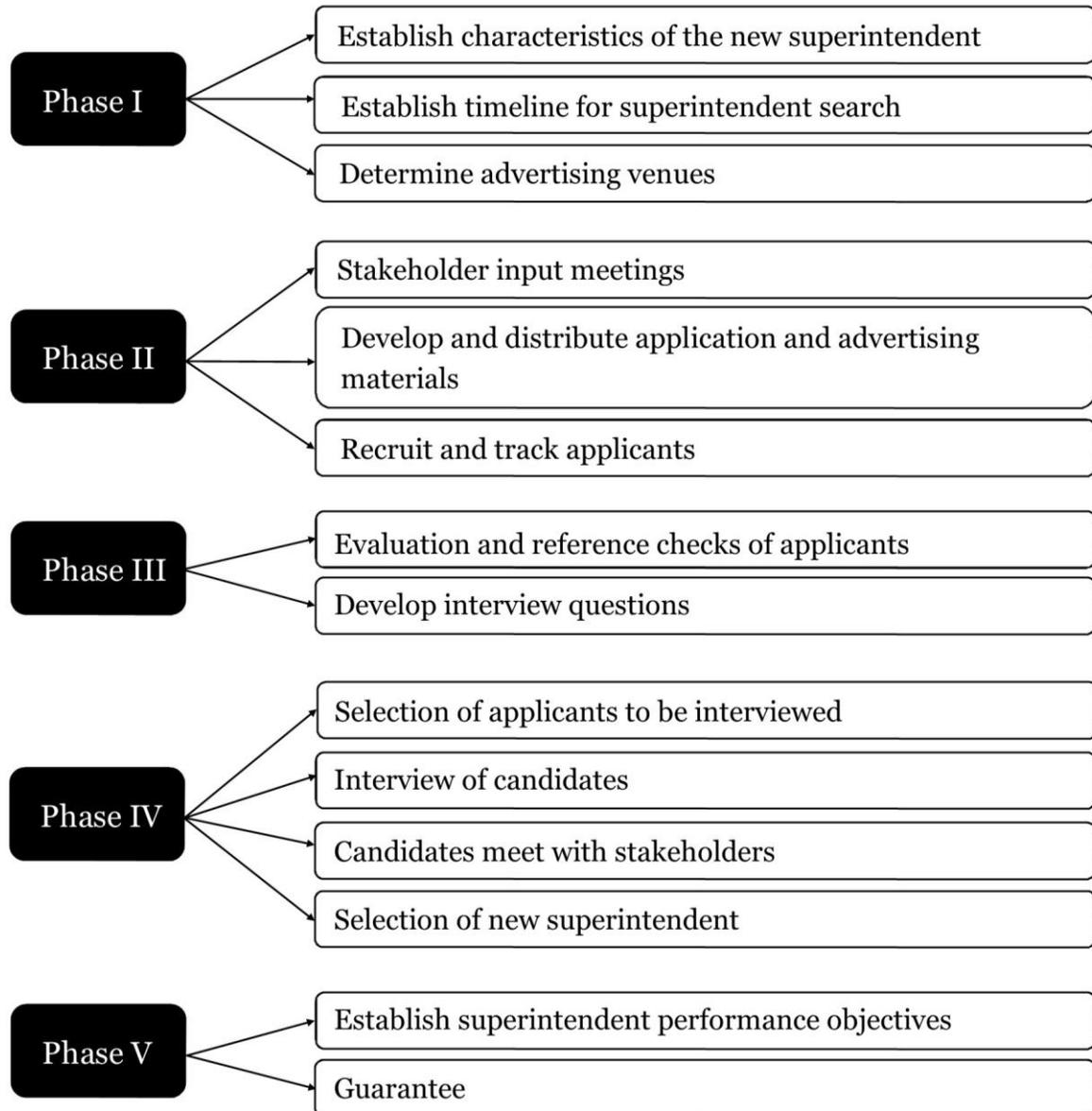
### *Executive Summary*

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—Initiating the Search Process*

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

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

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

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

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

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

- ✓ **Identify appropriate stakeholder groups.**

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

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

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

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

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

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

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

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

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

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

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

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

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

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 the state school board and administrator associations, as well as media venues selected by the board. Additionally, McPherson & Jacobson maintains an interactive website ([www.macnjake.com](http://www.macnjake.com)) that allows applicants to access all the application materials and apply online. The website averages over 225,000 hits per month.

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

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

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

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

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

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

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

✓ **Confidentiality of Applicants**

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

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

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

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

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

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

*Phase III—Applicant Screening*

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

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

✓ **Conduct reference checks.**

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

names of other people who can speak of the applicant's qualifications. We go a minimum of three people removed from the primary references. What we are looking for is consistency of answers that will verify the applicant's strengths and weaknesses.

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

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

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

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

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

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

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

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

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

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

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

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

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

✓ **Coordinate interview and visitation procedures.**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

✓ **Conduct background checks.**

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

*Phase V—Transition with Success*

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

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

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

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

✓ **Provide a guarantee.**

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

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

## *Timeline*

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

Search sequence:

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

*Responsibilities of North Santiam School District and  
McPherson & Jacobson, L.L.C.*

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

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

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

## *Stakeholder Involvement*

Obtaining stakeholder input is an integral part of McPherson & Jacobson's search process. Since 1991, McPherson & Jacobson has conducted over 870 superintendent searches for school districts ranging from 10 to over 300,000 students. For each search, we have coordinated stakeholder input sessions. Besides meeting with stakeholder groups designated by the board, an online input survey is also available for those who cannot attend the meetings. After the meetings have been completed, the board will receive a written report with the findings of the meetings and online input.

### **Initial stakeholder input sessions**

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

### **Meeting the candidates**

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

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

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

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

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

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

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

### **Process for Including Ethnically Diverse Communities**

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

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

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

## *Cost Proposal*

### *Investment*

**The fee for conducting the superintendent search is \$8,900 for Phases I-V.**

*McPherson & Jacobson has the tools to conduct all or some components of the search process electronically. We can work with the board to determine the best practices as the search progresses to determine if in-person or online meetings will best meet the needs of the district.*

**The total not to exceed amount including expenses is \$12,900.\***

Included in the expenses is

- Thirty (30) days on AASA (American Association of School Administrators)
- One posting on OSBA (Oregon School Boards Association)
- One posting on COSA (Coalition of Oregon School Administrators)
- One (1) day of in-person stakeholder meetings
- Online stakeholder input surveys
- Video interviews of candidates
- Criminal/financial/credential verification background check for the final candidate
- Travel expenses for consultants for scheduled trips to the school district.
- Office expenses

*\*If the district chooses to do parts of the search using online meetings, the expenses may decrease.*

#### **NOTE:**

- Expenses may increase if the district chooses additional media advertising.
- Fees and expenses will increase if the district requests additional stakeholder input days.
- Interview expenses for the candidates are not included in the expenses listed.
- There is an additional fee and expenses for the consultants to attend the interview sessions.

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.

#### **Price Match:**

McPherson & Jacobson, L.L.C. will match the search fee for comparable services.

**Guarantee:**

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

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

**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.

## *Additional Information*

### *McPherson & Jacobson, L.L.C. Consultants*

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

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

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

#### *Alabama Consultants*

**Dr. Barry Carroll**, Retired Superintendent, Educational Consultant, Athens

#### *Alaska Consultants*

**Mr. Shawn Arnold**, Former Superintendent, Valdez

#### *Arizona Consultants*

**Dr. William Dean**, Retired Superintendent, Tucson

**Ms. Barbara Dean**, Retired from AASA, Tucson

**Dr. Les Huth**, Retired Professor, Scottsdale

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

**Dr. Barry Kayrell**, Retired Superintendent, Prescott

**Ms. Anna Maiden**, Retired School Administrator, Tucson

**Ms. Jennifer Tanner**, Board Member, El Mirage

#### *Arkansas Consultants*

**Dr. Megan Duncan**, Associate Superintendent, Fayetteville

**Mr. Wayne Gibson**, Board Member, El Dorado

**Dr. T. Kenneth James**, Education Consultant, Batesville

**Mr. Bobby Lester**, Retired Superintendent, Consultant Emeritus, Jacksonville

**Dr. John H. Moore**, Retired Superintendent, Magnolia

**Dr. Tony Thurman**, Superintendent, Cabot

**Mr. Mitch Walton**, Professor, Searcy

**Mr. Jerrod Williams**, Superintendent, Sheridan

**Dr. Kieth Williams**, Retired Superintendent, Beebe

#### *California Consultants*

**Mrs. Janice Adams**, Retired Superintendent, Benicia

**Mrs. Nicole Anderson**, Educational Consultant, Vallejo

**Mr. James Bates**, Retired Superintendent, Bakersfield

**Ms. Aida Buelna**, Retired Superintendent, Woodland  
**Mr. Robert Ferguson**, Retired Superintendent, Napa  
**Dr. Reyes Gauna**, Superintendent—Byron Union School District  
**Mr. William Huyett**, Retired Superintendent, Lodi  
**Mr. Benjamin “Ben” Johnson II**, Former Board Member, Riverside  
**Dr. Barry Kayrell**, Retired Superintendent, Murrieta  
**Dr. Steven Lowder**, Retired Superintendent, Stockton  
**Dr. Michael McCoy**, Retired Superintendent, Bakersfield  
**Mr. Jesse Modesto**, Retired Administrator, Woodland  
**Dr. Daniel Moirao**, Retired Superintendent, Danville  
**Dr. Stanley Munro**, Administrator, Fresno USD, Clovis  
**Mr. Dennis Murray**, Retired Superintendent, Murrieta  
**Dr. Marilyn Shepherd**, Retired Superintendent, Friant  
**Mr. Edward Velasquez**, Retired Superintendent, Chino  
**Mr. Daniel Zeisler**, Retired Superintendent, Grass Valley

**Colorado Consultants**

**Dr. Walter Cooper**, Retired Superintendent, Colorado Springs  
**Dr. Kenneth Haptonstall**, Colorado River BOCES Executive Director, Grand Junction  
**Mr. Paul Reich**, Former school board member, Telluride  
**Dr. Norman Ridder**, Retired Superintendent, Arvada  
**Dr. Henry Roman**, Retired Superintendent, Pueblo  
**Dr. Christy Sinner**, Superintendent, Hayden  
**Dr. Randall Zila**, Centennial BOCES Executive Director, Loveland

**Florida Consultants**

**Dr. Ralph Ferrie, Jr.**, Retired Superintendent, Lake Mary  
**Dr. Marjorie Alexander Wallace**, Retired IU Director, Palm Harbor

**Georgia Consultants**

**Dr. Michelle Hamilton**, Georgia Department of Education, Marietta

**Idaho Consultants**

**Dr. Linda Clark**, Retired Educator, Boise  
**Dr. William Dean**, Retired Superintendent, Post Falls  
**Ms. Barbara Dean**, Retired from AASA, Post Falls  
**Mr. Edward Velasquez**, Retired Superintendent, Hayden

**Illinois Consultants**

**Dr. William Caron**, Superintendent, Galena  
**Dr. John Closen**, Adjunct Professor, Peoria  
**Dr. Lloyd Kilmer**, Retired Professor, Moline

**Iowa Consultants**

**Ms. Kimberly Antisdell**, Retired Administrator, Grimes  
**Mr. Dennis Bahr**, Retired Superintendent, Webster City

**Dr. Paul Gausman**, Superintendent, Sioux City Comm. Schools, Sioux City  
**Dr. Derrick Joel**, Superintendent, Fort Dodge CSD, Fort Dodge  
**Dr. Lloyd Kilmer**, Retired Professor, Le Claire  
**Mr. Gary McAndrew**, Former Board Member, Peosta  
**Mr. Lyle Schwartz**, Retired Superintendent, Story City  
**Dr. Richard Sundblad**, Consultant Emeritus, Urbandale  
**Dr. Steve Williams**, Consultant Emeritus, Monticello

**Kansas Consultants**

**Mr. Dennis Burke**, Retired Superintendent, Baxter Springs  
**Dr. James Christman**, Retired Professor, Pittsburg  
**Dr. Craig Elliott**, Retired Superintendent, Sedgwick  
**Dr. Justin Henry**, Superintendent, Goddard  
**Dr. James Karleskint**, Retired Superintendent, Tonganoxie  
**Mr. Von Lauer**, Retired Superintendent, Sabetha  
**Dr. Bradley Rahe**, Retired Superintendent, Holton

**Louisiana Consultants**

**Ms. Janet Dixon**, Former Board Member, Alexandria  
**Ms. Lorethie Dunn**, Former Board Member, Bastrop  
**Dr. Gerald Keller**, Past Superintendent/Board Member, Reserve  
**Mr. John Smith**, Board Member, St. Rose

**Michigan Consultants**

**Dr. Shelley Holt**, Educational Consultant, Belleville

**Minnesota Consultants**

**Dr. Linda Madsen**, Retired Superintendent, Forest Lake  
**Dr. Gary Schnellert**, Retired Professor, Sartell

**Mississippi Consultants**

**Dr. Tom Clark**, Retired Superintendent, Petal  
**Dr. James Hutto**, Retired Superintendent, Petal  
**Mr. Ronald Walker**, Retired Superintendent, Hattiesburg

**Missouri Consultants**

**Dr. Randal Bagby**, Superintendent, La Monte R-IV School Dist., Gravois Mills  
**Dr. James Christman**, Retired Professor, Carl Junction  
**Dr. Dennis Cooper**, Retired Superintendent, Springfield  
**Dr. Jeanette Tendai**, Retired Educator, St. Louis  
**Dr. Philip Schoo**, Superintendent Emeritus, Consultant Emeritus, Columbia  
**Dr. Judith Sclair-Stein**, Retired School Administrator, Chesterfield

**Montana Consultants**

**Dr. Michael McLaughlin**, Educational Consultant, Butte  
**Mrs. Sharla Anderson Johns**, Retired Administrator, Victor

**Nebraska Consultants**

**Dr. Mike Cunning**, Retired Superintendent, Hershey  
**Mr. Alan Ehlers**, Superintendent, Madison  
**Dr. Jerry Ehlers**, Consultant Emeritus, Retired Superintendent, Ainsworth  
**Dr. Randall Gilson**, Superintendent, Blair  
**Dr. Steve Joel**, **National Recruiter**, Superintendent, Lincoln, Nebraska  
**Mr. Brandon Lavaley**, Superintendent, Wahoo  
**Dr. Mike Lucas**, Superintendent, Westside Comm. Schools, Omaha  
**Dr. Blane McCann**, Retired Superintendent, Educational Consultant, Omaha  
**Mrs. Jane McDaniel**, Former Board Member, Plattsmouth  
**Dr. Randy Nelson**, Consultant Emeritus, Retired Superintendent, Seward  
**Dr. James Ossian**, Professor Emeritus, Wayne State College, Wayne  
**Dr. Aaron Plas**, Superintendent, Lakeview Community Schools, Columbus  
**Mr. Darren Tobey**, Superintendent, Broken Bow  
**Mr. Antwan Wilson**, Professor/Educational Consultant, Lincoln  
**Dr. Rob Winter**, Retired Superintendent, Grand Island

**New Jersey Consultants**

**Dr. Ralph Ferrie, Jr.**, Retired Superintendent, Brick  
**Dr. Candis Finan**, Retired Superintendent, Summit  
**Dr. Michael Kozak**, Assistant Professor, Drexel University., Marlton  
**Dr. Christopher Tienken**, Professor, Educational Consultant, Spring Lake Heights

**New Mexico Consultants**

**Mr. Vernon Asbill**, Retired Superintendent, Artesian  
**Dr. Greg Rockhold**, Director of Programs, Hobbs Municipal Schools

**New York Consultants**

**Dr. William Christensen**, Superintendent, Sidney Central, Binghamton  
**Dr. John Gratto**, Professor, Plattsburgh  
**Dr. Jody Francis Manning**, Educational Consultant, Cicero  
**Dr. Susan Vickers**, Retired Superintendent, Camillus

**North Carolina Consultants**

**Dr. David Rizer**, Retired Superintendent, Vilas

**North Dakota Consultants**

**Dr. Cory Steiner**, Superintendent, Northern Cass School District, Hunter

**Ohio Consultants**

**Dr. Renee Willis**, Superintendent, Richmond Heights, Willoughby Hills

**Oregon Consultants**

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

**Pennsylvania Consultants**

**Dr. Marjorie Alexander Wallace**, Retired IU Director, Waterford

**Dr. Candis Finan**, Retired Superintendent, Matamoras  
**Dr. Patrick O'Toole**, Educational Consultant, Cranberry Township  
**Dr. Jeffrey West**, IU Director, New Oxford

**South Dakota Consultants**

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

**Tennessee Consultants**

**Dr. Richard Miller**, Retired Superintendent, Thompson's Station

**Texas Consultants**

**Dr. Donald Rhodes**, Superintendent, Crowell Independent School District

**Washington Consultants**

**Dr. Gustavo Balderas**, Superintendent, Edmonds  
**Dr. Michael Brophy**, Retired Superintendent  
**Dr. Robert Clark**, Part-time Superintendent, Washtucna  
**Mr. Howard King**, Retired Superintendent, Spokane  
**Dr. Steven Lowder**, Retired Superintendent, Vancouver  
**Dr. Nathan McCann**, Superintendent, Ridgefield  
**Mr. Richard Parker**, Former Board Member, Everett  
**Dr. PJ Ford Slack**, Retired Administrator, Ocean Shores  
**Mr. Richard Stewart**, Retired Superintendent, Ferndale

**Wisconsin Consultants**

**Dr. Vance Dalzin**, Retired Superintendent, Milwaukee  
**Dr. Brian Hanes**, Retired Superintendent, Oostburg  
**Mr. Damian La Croix**, Superintendent, Suamico

**Wyoming Consultants**

**Mr. David Barker**, Superintendent, Fremont County School District #1, Lander  
**Dr. Chuck Grove**, Retired Superintendent, Pinedale

## *McPherson & Jacobson's Superintendent Searches for Oregon School Districts*

Year	District	School city	Enrollment
2021/22	Grants Pass School District 7	Grants Pass	6,200
2021/22	Oregon City School District	Oregon City	8,058
2021/22	Greater Albany Public Schools	Albany	9,300
2020/21	Winston-Dillard School District No. 116	Winston	1,400
2020/21	North Wasco County School District 21	The Dalles	3,000
2018/19	North Bend School District	North Bend	2,300
2018/19	Springfield Public Schools	Springfield	10,700
2017/18	Reynolds School District	Fairview	11,200
2014/15	Bend-La Pine Schools	Bend	17,300
2011/12	Reynolds School District	Fairview	14,000

## *What Board Members Say About McPherson & Jacobson's Search Services*

**Nori Juba**

2976 NW Underhill Pl

Bend, OR 97703

(541) 788-7872

Dear School Board Members and School Districts:

Please regard this letter as my highest recommendation for the work that McPherson and Jacobson completed in a Superintendent Search for the Bend La Pine School District in Bend, Oregon. The district serves over 18,000 students and is the fifth largest in the state. I served on the board for nearly twelve years and headed the search process as a Co-chair of the Board of Directors. I had also previously led another superintendent search for the district with a competitor national search firm that did a fraction of the work that M&J performed at the same cost.

The board's goal was to hire a firm that not only understood our aspirational goals but the culture and the challenges of our community. We expected the firm to deliver highly qualified candidates from around the country. We worked with Dr. Jacobson to provide us with a lead consultant that understood both our community and the educational practices of our district. We demanded a disciplined process that moved the heavy lifting from the board and the district to the firm. They delivered on all.

Our lead consultant actually developed relationships with our top candidates and was able to provide many valuable insights. He not only brought forth strong candidates but was able to steer us to the right decision through a structured process and a true understanding of our needs and goals.

I would be pleased to provide more details by phone or email ([nori.juba@gmail.com](mailto:nori.juba@gmail.com)).

Sincerely,



Nori Juba

AVID, Board of Directors

Bend La Pine Schools, Board of Directors (2005-2017)



Reynolds School District  
Administration Offices  
1204 NE 201<sup>st</sup> Avenue  
Fairview, OR 97024  
503.661.7200 • FAX 503.667.6932

April 26, 2012

To Whom It May Concern:

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

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

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

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

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

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

Respectfully,

*Theresa Delaney Davis*

Theresa Delaney Davis  
Chair

*A great place for learning.*

[www.reynolds.k12.or.us/schools/](http://www.reynolds.k12.or.us/schools/)

**North Santiam School District**  
Superintendent Search 2021-22  
February 3, 2022

# Proposal

OREGON SCHOOL BOARDS ASSOCIATION



# Table of Contents

<b>Item</b>		<b>Page(s)</b>
1.	Introduction Letter	3-4
2.	A: Proposed Search Plan	5
	Search Process Overview	6-7
	Frequently Asked Questions	8-10
3.	B: Consultant Profile & Information	11
	Consultant Biographies	12-14
	References	15-17
	Search History	18
	Search Comments (testimonials)	19
4.	C: Sample Contract for Services	20
	Sample Contract for Services	21-23

February 3, 2022

Alisha Oliver, Board Chair  
North Santiam School District  
1155 N 3<sup>rd</sup> Ave  
Stayton, OR 97383

Re: Superintendent Search - 2021-22

Dear Ms. Oliver and Board of Directors,

## INTRODUCTION

We are submitting this Proposal to the North Santiam School Board of Directors for the Superintendent search with the position beginning work no later than July 1, 2022. While we have included information about our search services, prior searches and what the North Santiam School District search might include, we want to emphasize that each of our executive searches can be customized to meet the school's needs and maximize use of the school's resources.

OSBA has a long history of providing an array of comprehensive services to its members - Oregon school boards. In addition to the search process, OSBA can provide customized services to support the new leadership team - Board and Superintendent.

For this search **Steve Kelley** will be the lead consultant with **Sarah Herb** providing support where needed. During the search you may be introduced to other members of our search team, as needed. Biographies for each consultant on our search team are enclosed. Annually, we assist with searches for about 10-15 superintendent and other executive director positions in Oregon.

Our fundamental beliefs about a successful executive leadership search revolve around three core principals - Relationships, Recruiting, and Results.

## RELATIONSHIPS

Successful searches are not the result of having a remote headquarters in a big city in another state which handles all the core search services. On the contrary, superintendent searching is about local connections, networks and easy access to all elements of the search process. Building a strong relationship with the board and other relevant stakeholder groups is a key characteristic of our success in superintendent/executive director searches. We focus on:

- Community, staff and student engagement to develop the search criteria
- Frequent and thorough coaching, training, facilitation and reporting with the Board
- Strict attention to candidate confidentiality to safeguard their current positions
- Involving staff and community in appropriate search activities asking for their advice
- OSBA provides board development/training to follow up after the search
- Simply, working harder than other search organizations

In most candidate fields for medium-sized districts and larger about 30-40% of the candidates are typically diverse candidates depending on one's definition of diversity. This high percentage is attributable to regular contact by direct e-mail with virtually all school administrators in most states with high numbers of diverse education administrators, e.g., California, Texas, Nevada and New Mexico. This marketing strategy is supplemented by also networking with associations representing diverse candidates such as Oregon Association of Latino Administrators (OALA) and placing job vacancy advertising on their websites.

Our philosophy about superintendent searches is slightly different from other search firms and associations. Basically, we want to become the District's search partner, not just serve as consultant and supervise a process - a subtle, but important difference in our working relationship. **Together** we look for the right candidate.

## RECRUITING

Here is where we differ significantly from other search organizations and national search firms. We **do not** just bring forward to the Board a group of our favorite candidates/applicants who have signed up with the firm to find a job. Instead, we reach out via e-mail messages directly to the computer screens, tablets and smart phones to over 40,000 superintendents, school administrators, and education college faculty across the country, with heavy emphasis on the western United States. This method of communication and marketing for positions has proven to be enormously successful. We also take full advantage of electronic social media to recruit candidates and advertise and recruit regionally and nationally in a more traditional sense by posting on online educator job boards. Not only do we passively recruit by posting/advertising the position, but we also actively recruit viable candidates with direct e-mail communication and telephone calls.

## RESULTS

Our method of recruiting has resulted in candidate fields significantly larger than our competition and we deliver to the Board **all** qualified applications for review, not just a select few. We report actual applications and not merely candidates who expressed interest or submitted an inquiry. Over the past 5 years the average-size search fields for districts looking for a full-time superintendent/executive director has ranged from 20-30 applicants for each position. If working together we do not find a suitable fit for your district in the initial candidate field, we simply keep working the project until someone acceptable is found.

Our search experience for Oregon school superintendent/executive director searches is unmatched. OSBA has conducted over 500 executive searches for school districts, charter schools, education service districts, community colleges and other state agencies since 1984. **We know and serve the state of Oregon better than anyone in the business.** We are committed to your success!

## TRANSITION PLAN

Because the first year is so critical for setting the tone of professional relationships, OSBA, in conjunction with Coalition of Oregon School Administrators (COSA), provides a unique collaboration designed to support the Superintendent and Board. OSBA will meet with you and your new chief executive to:

- a) Review your district's vision, mission and goals (strategic plan) with the new Board and Superintendent team
- b) Design effective communication and PR strategies designed to introduce your new executive to the community
- c) Discuss the roles and responsibilities of the Board and Superintendent
- d) Create an effective operating agreement
- e) Establish/review the Superintendent's performance evaluation system and timeline.

## PRICE

Based on the scope of work anticipated for this search, the **Base Fee** price for a full-service Consultant supervised search as described in the Search Overview later in this Proposal is **\$9,975** which includes a standard package of advertising and up to 9 hours of professional development for the Board and new Superintendent. **Reimbursable expenses** incurred by the Consultants **are additional** which typically include travel, lodging, and meals.

Please circulate this Proposal to the Board for their consideration. We want to help find a difference-maker for your District. We are available to answer questions related to a superintendent search in general and this Proposal specifically. For additional information, please do not hesitate to ask.

Best Regards,



**Steve Kelley**

Director of Board Development and Executive Searches  
Oregon School Boards Association  
503-588-2800

60

SECTION A

# Proposed Search Plan



# Search Process Overview

---

All searches conducted by Oregon School Boards Association are customizable to meet the needs of the School/District and a specific calendar is developed in the Planning Phase to fit the School/District's schedule. For illustration purposes, a "sample" search might include the following components along with a projected general timetable that positions the School/District in the candidate market at the time needed for optimal exposure to prospective candidates.

## DATE

## ACTIVITY

### Planning Phase

Feb, 2022

Search organization and planning meeting with Consultant(s), Board  
 Board and Board Secretary (probably during regular board meeting)  
 Scope of work  
 Develop draft search calendar  
 Discuss search literature and marketing strategy Identify  
 advertising/posting targets  
 Identify application requirements

### Qualifications Phase

Feb, 2022

Conduct survey for candidate qualifications, criteria and candidate profile with  
 some or all of the following groups:  
 Community & business leaders Local government leaders  
 Union leaders  
 Administrators Teachers Classified staff  
 Confidential staff Student leaders

Board meeting (public meeting - open session)  
 Report results of candidate qualifications process  
 Take public input on qualifications  
 Board adopt qualifications  
 Board adopt search calendar  
 Board declare position vacant  
 Adopt salary range (Consultant provides salary comparison)

### Advertising Phase

Feb - Mar, 2022

Consultants prepare search literature and post the position

Open the application period

Post notice of vacancy on District website

Distribute notice of vacancy to direct e-mail distribution list  
 Over 40,000 educators nationwide  
 Focus distribution on Western US

Advertise vacancy on association and search websites  
 OSBA included in contract price  
 COSA included in contract price  
 WASA included in contract price  
 LinkedIn notice to connections  
 Others as agreed with Board

**Recruitment Phase**  
Feb – Mar , 2022

Consultants recruit candidates  
Distribute application packets to prospective candidates  
Correspond with prospective candidates  
Receive, process and organize applications  
Board appoints screening committee

Close application period  
Consultant assembles applications and screening packets

**Screening Phase**  
Mar , 2022

Board meeting (public meeting - open session)  
Screening group and Board training for application review  
Begin reviewing applications (executive session)

Continue reviewing applications individually

Special Board meeting  
Debrief screening results (executive session)  
Identify interview candidates (executive session)  
Interview training for Board (public session)  
Board conducts social media and internet checks  
Organize initial candidate interviews (public session)

**Interview Phase**  
Apr, 2022

Board meeting (executive session) (exact dates/times TBD)

Conduct initial interviews with selected candidates

Board meeting (executive session) (after last interview)  
Debrief candidate interviews  
Select finalist(s)

Consultant notifies finalists

Board and Consultants conduct reference checks  
Telephone contact with references Internet searches  
Licensure investigation  
Organize site visits in finalists' home district

Organize "day in the district" for finalists  
2<sup>nd</sup> interviews with board (executive session)

**Selection Phase**  
Apr - May, 2022

Board meeting (executive session)  
Debrief "day in the district,"  
2<sup>nd</sup> interviews, ref. checks  
Select new Superintendent

Board negotiate contract with "top choice" candidate  
Announce selection of new Superintendent

Board meeting (public meeting - open session)  
Formal contract offer to "top choice" candidate  
Introduce new Superintendent

July 1, 2022

Superintendent begins work

TBD, 2022

Board/New Superintendent Development Workshop and Transition Plan



# Frequently Asked Questions

---

## 1. What are the key elements in your process?

*Answer:*

Key elements of our search process are:

- flexibility in the process
- stakeholder involvement to build support for the selection
- spending more time in the district than other search firms
- keeping the Board involved and informed at every step
- partnering with district to maximize use of available resources
- recruiting - not just advertising the position
- sticking with the search until we find the “right fit”
- working harder for your search than other consultants

## 2. How is your process different than other executive search firms?

*Answer:*

The steps in a search process for most consultants are relatively similar. However, one important difference is our commitment to **your** search. We are not like a Costco of search consultants where volume counts. We are more of a boutique search firm specializing in customer service. We do not simply want to find a new Superintendent. We want to help you find a difference-maker who is the right fit for **your** district.

## 3. Do you prepare and mail a print brochure advertising the vacancy?

*Answer:*

Preparing a print brochure advertising the position and promoting the school district and community is just not current reality. We have the graphics design capacity to create a first quality electronic brochure instead. In the last few years, no candidates have asked for a mailed print brochure. We prepare a colorful brochure about the position and the district suitable for electronic distribution and, if necessary, print a copy on request.

## 4. Describe the role of the School Board in the screening/selection process?

*Answer:*

Ultimately, the Board makes the decision about who to interview after screening the applications. However, we strongly encourage the Board to seek the advice of a screening committee whose composition might include administrators, other staff, and parent/community representatives. An effective screening committee size might be 15-18 others in addition to the Board members.

Usually, the Board members conduct the initial interviews. Sometimes, a few members of the screening committee are observers during the interview process. Observers do not ask questions - just observe. More eyes and ears during the interviews often result in a richer discussion by the Board when narrowing the field of interviewees to finalists.

## **5. How do you recruit quality candidates for the position?**

*Answer:* The range of advertising for a vacancy posting is a part of the planning process for each search. The vacancy will be posted in a traditional manner state-wide, regionally and nationally, as the Board chooses. We have multiple options for regional and national advertising. These traditional posting opportunities include multiple diversity group job placement websites to be sure minority candidates are aware of the vacancy. But we do more.

In addition to posting widely, we directly notify superintendents and other administrators in Oregon, Washington, Idaho, Montana, Utah, Alaska, Nevada, Wyoming, Colorado, Arizona, New Mexico, Texas, California and other states about the vacancy by electronic message. We also send the electronic messages to the faculties for colleges of education in the western U.S and other highly regarded colleges of education. The list of direct marketing groups grows each year. Currently, we have approximately 40,000 prospective candidates and other educators in our e-messaging data base. This approach puts the availability of the position directly in front of prospective candidates on their computer screens, tablets or smart phones. Because we use an e-marketing service for the vacancy announcements, the notification can be sent multiple times and will be sent at least twice during the application period.

Unlike some other search firms, we will also directly recruit candidates who might fit the profile the board seeks for its next superintendent. We network with superintendents about other qualified candidates who we will also contact. In other words, we work the phones and e-mails.

## **6. What involvement will District staff have in the search process? How much time will this take away from their other duties?**

*Answer:* The short answer is that the search process generally takes very little of the staff's time. The work of the search process is largely an activity for the Board, consultant and Board Secretary. Since the search for a superintendent often involves candidates who need confidentiality in the early stages, keeping the application process off-site with a consultant provides the candidates some comfort that their names will not be exposed prematurely to the existing staff. However, administrators and other staff or their representatives may be involved at various stages that might include:

- communications coordination
- implementing a marketing strategy
- interviews and focus groups for desired qualities and qualifications
- participation on a committee to screen applications
- observe candidate interviews
- accompany a finalist for a "day in the district"

## **7. What items are usually included in “costs and expenses” related to the search?**

*Answer:* The amount for costs and expenses the District can expect to spend (both District and consultant combined) varies depending on the scope of advertising, the geographic location of interview candidates, and the resources the District has available to assist with the search. However, as a “general rule” for most searches, the District can expect to spend an amount equal to no more than one-half the search fee for additional costs and expenses. However, in our experience the “costs and expenses” are frequently substantially less than the general rule usually not exceeding \$2,000-\$3,500 total even for larger districts.

### **Typical items of expense are:**

- Fees for advertising/posting of vacancy
- Travel expenses (mileage, travel time, meals, lodging) for consultant
- Interview candidate transportation and lodging costs

## **8. How will our community and staff be involved in the search?**

*Answer:* Community and staff engagement is a vital part of a successful superintendent search. Typically, we arrange a series of meetings with community groups, staff, students and others to explain the search process. At that meeting we also solicit suggestions and comments about the characteristics sought in the next superintendent. For those unable to attend one of the meetings, we provide an online survey with the same questions. We telephone interview local business and community leaders for the same purpose. This information is presented to the Board in a consultant’s report to be used when deciding the qualities and profile characteristics sought for the new superintendent. Community members and staff will often also serve on the screening committee for applicants and participate as observers for interviews. When the finalist candidates are invited to the district for a “day in the district,” the community and staff will have an opportunity to interact with the finalists and report their observations.

## **9. How do you take advantage of technology and social media to aid in the search?**

*Answer:* We use electronic technology when it provides effective assistance in marketing the vacant position, contributes to finding the right fit, and is user-friendly. For example, we market the vacant position taking full advantage of a multi-media approach that includes online job postings, website information, online surveys, e-marketing and social networking. However, while we sometimes accept online applications from those candidates who choose that method, we also accept applications electronically in PDF format, traditional mail/UPS/FedEx, and personal delivery of a hard copy. In this respect we are candidate friendly. For some searches we set up an all-electronic application screening process allowing the application reviewers to do their work at their convenience. Note: this method requires extraordinary precautions to maintain confidentiality of application materials. While this method offers more convenience, we believe much of the value of screener interaction, discussion, and questions are lost in this method. Basically, we follow a technology rule that says, “use it if it works – otherwise don’t change just because it’s new technology.”

SECTION B

# Consultant Profiles & Information



## Steve Kelley

Steve Kelley joined the Oregon School Boards Association (OSBA) staff in July, 2015 as Director of Board Development. He is responsible for Board training and also leads the Executive Search team. Steve has 38 years of experience in public education, including six years as superintendent of the South Umpqua School District. His career includes stops in Florida, Wyoming and New Mexico, and the last 19 years in Oregon. Steve lives in Stayton, Oregon (east of Salem).

### Education

Education Leadership Certification/Coursework University of North Florida  
University of Oregon Master of Arts – Adult Education  
University of South Florida Bachelor of Science - Secondary Education  
Flagler College (graduated Cum Laude)

### Education Employment

2015-present	Director of Board Development – OSBA
2009-2015	Superintendent – South Umpqua SD
2001-2009	Assistant Superintendent – Lebanon Community SD
2000-2001	Founding Principal – East Mountain Charter HS, Albuquerque PS (NM)
1998-2000	Middle School Principal – Uinta County SD (WY)
1995-1998	Middle School Principal/Asst. Principal – Nassau County SD (FL)
1982-1995	Teacher of math/science – Baker & Marion County SDs (FL)

### Education & Community Service

Confederation of Oregon School Administrators  
Oregon Association of School Executives  
OASE Funding Coalition Subcommittee  
Canyonville Lions Club “Educator of the Year” for 2012  
Local service clubs including Chamber of Commerce and Elks



## Sarah Herb

Sarah Herb joined the Oregon School Boards Association (OSBA) staff in 2016 bringing with her a background in vocational education and public service.

Sarah graduated with degrees in Natural Resources and Watershed Management from Oregon State University. She worked as a registrar and acting assistant to the campus president at two vocational colleges, working directly with students to ensure degree completion, as well as planning graduations and other events.

At OSBA, Sarah has assisted with over 50 superintendent searches and is the event planner for OSBA's multiple major annual statewide conferences. She believes that selecting the right educational leader for a district is one of the most important functions of a school board and is passionate about supporting and facilitating that process.

### Education

Bachelor of Science - Natural Resources, Watershed Management, Oregon State University

### Education Employment

2018-present	Executive Search and Events Specialist- OSBA
2016-2018	Board Development Assistant- OSBA
2013-2014	Registrar-ITT Technical Institute
2010-2013	Registrar-Institute of Technology Salem



## Milt Dennison

Milt Dennison has 13 years of superintendent and administrator search experience in both Oregon and Washington. He also knows what it takes to be a successful superintendent having served as a K-12 superintendent in Washington, a K-8 superintendent in Oregon and an ESD superintendent. He brings valuable on-the-ground experience to the search team. Milt lives in Oregon City, Oregon.

### Education

1980	Ed.D. Educational Administration and Curriculum, Univ. of Southern California
1975	M.A. Educational Administration California State University, Sacramento
1970	B.A. Mathematics and Physical Education, Western State College

### Education Employment

2016-2017	Interim Superintendent, Columbia Gorge ESD
2004-2016	Superintendent, Clackamas Education Service District
1993-2004	Superintendent, Camas School District (WA)
1986-1993	Superintendent, Canby Elementary School District
1984-1986	Director of Curriculum & Instruction, West Linn School District
1975-1984	Middle and Elementary School Principal

### College Instructor

2011-2013	Adjunct Professor, University of Portland Education Leadership Program
2006-2009	Adjunct Professor, Lewis & Clark College Educational Leadership Doctoral Program
1986-1994	Adjunct Professor, Lewis & Clark College Administrative Leadership, Community Relations

### Education & Community Activities

Oregon Teacher Standards and Practices Commission (2007-13)  
Oregon Association of Education Service Districts board member (Zone A Chair)  
Cascade Council of the Boys Scouts of America board member (Senior Vice-President)  
Washington State Association of School Administrators board member

### Awards & Honors

American Association of School Administrators “Civic Star Award” Camas-Washougal Chamber of Commerce “Citizen-of-the-Year” Camas-Washougal Rotary Club “Rotarian-of-the-Year” Washington Association of School Administrators “Award of Merit”



## References

---

### **Bandon SD - 2021**

Angela Cardas, Board Chair - [cardasphotography@gmail.com](mailto:cardasphotography@gmail.com); 541-936-2755  
Shauna Schmerer, Superintendent - [sschmerer@bandon.k12.or.us](mailto:sschmerer@bandon.k12.or.us); 541-347-4411

### **Central Curry SD - 2021**

Andy Wright Board Chair - [awright@ccsd.k12.or.us](mailto:awright@ccsd.k12.or.us); 541-373-3296  
Eric Milburn, Superintendent - [emilburn@ccsd.k12.or.us](mailto:emilburn@ccsd.k12.or.us); 541-247-2003

### **Colton SD - 2021**

Sid Gunter, Board Chair - [gunters@colton.k12.or.us](mailto:gunters@colton.k12.or.us); 503-780-8874  
Dave Kline, Interim Superintendent - [klined@colton.k12.or.us](mailto:klined@colton.k12.or.us); 503-824-3535

### **Enterprise SD - 2021**

Mandy Decker, Board Chair - [mandy.decker@co.wallowa.or.us](mailto:mandy.decker@co.wallowa.or.us); 541-398-1000  
Thomas Crane, Interim Superintendent - [tcrane@enterprise.k12.or.us](mailto:tcrane@enterprise.k12.or.us); 541-426-4733

### **Ione SD - 2021**

Rob Crum, Board Chair - [rob.crum@ionesd.org](mailto:rob.crum@ionesd.org); 541-314-5179  
Kevin Dinning, Superintendent - [kevin.dinning@ionesd.org](mailto:kevin.dinning@ionesd.org); 541-422-7131

### **Junction City SD - 2021**

Daniel Allred, Board Chair - [danielallredjc@gmail.com](mailto:danielallredjc@gmail.com); 541-998-2060  
Troy Stoops, Superintendent - [tstoops@junctioncity.k12.or.us](mailto:tstoops@junctioncity.k12.or.us); 541-998-6311

### **Mt. Angel SD - 2021**

Shari Riedman, Board Chair - [shari.riedman@masd91.org](mailto:shari.riedman@masd91.org); 503-989-1945  
Rachel Stucky, Superintendent - [rachel.stucky@masd91.org](mailto:rachel.stucky@masd91.org); 503-845-2345

### **South Coast ESD - 2021**

Corinne Potts, Board Chair - [cpotts.screl@orcca.us](mailto:cpotts.screl@orcca.us); 503-290-9449  
Charis McGaughy, Interim Superintendent - [charism@scesd.k12.or.us](mailto:charism@scesd.k12.or.us); 541-269-1611

### **Spray SD - 2021**

David Newton, Board Chair - [newton.david83@gmail.com](mailto:newton.david83@gmail.com); 541-934-2205  
Glen Butler, Interim Superintendent - [gbutler@spray.k12.or.us](mailto:gbutler@spray.k12.or.us); 541-408-0763

### **Sweet Home SD - 2021**

Jason Redick, Board Chair - [jason.redick@sweethome.k12.or.us](mailto:jason.redick@sweethome.k12.or.us); 541-401-8601  
Lisa Riggs, Superintendent - [lisachildressriggs@gmail.com](mailto:lisachildressriggs@gmail.com); 775-842-1282

### **Woodburn SD - 2021**

Anthony Medina, Board Chair - [Anthony.medina@alumni.stanford.edu](mailto:Anthony.medina@alumni.stanford.edu); 503-710-5900  
Juan Larios, Superintendent - [jlarios@woodburnsd.org](mailto:jlarios@woodburnsd.org); 503-981-9555

### **Yamhill-Carlton SD - 2021**

Susan FitzGerald, Board Chair - [fitzgerald.susan263@gmail.com](mailto:fitzgerald.susan263@gmail.com); 503-662-4832  
Clint Raever, Superintendent - [raeverc@ycschools.org](mailto:raeverc@ycschools.org); 541-875-2942

### **Brookings-Harbor SD - 2020**

Alan Nidiffer, Board Chair - [alann@brookings.k12.or.us](mailto:alann@brookings.k12.or.us); 541-251-0145

David Marshall, Superintendent - [dmarshall@brookings.k12.or.us](mailto:dmarshall@brookings.k12.or.us); 541-667-6020

### **Corbett SD - 2020**

Michelle Vo, Board Chair - [mvo@corbett.k12.or.us](mailto:mvo@corbett.k12.or.us); 503-381-9989

Dan Wold, Superintendent - [dwold@corbett.k12.or.us](mailto:dwold@corbett.k12.or.us); 503-261-4200

### **Dayton SD - 2020**

Christopher Wytoski, Board Chair - [christopher.wytoski@dayton.k12.or.us](mailto:christopher.wytoski@dayton.k12.or.us); 541-520-5119

Steve Sugg, Superintendent - [steven.sugg@dayton.k12.or.us](mailto:steven.sugg@dayton.k12.or.us); 503-864-2215

### **Eagle Point SD - 2020**

Nita Lundberg, Board Chair - [lundbergn@eaglepnt.k12.or.us](mailto:lundbergn@eaglepnt.k12.or.us) ; 541-261-8023

Andy Kovach, Superintendent - [kovacha@eaglepnt.k12.or.us](mailto:kovacha@eaglepnt.k12.or.us); 541-830-1200

### **Marcola SD - 2020**

Jim Smith, Board Chair - [jsmith@marcola.k12.or.us](mailto:jsmith@marcola.k12.or.us); 541-933-2256

Terry Augustadt, Superintendent - [taugustadt@marcola.k12.or.us](mailto:taugustadt@marcola.k12.or.us); 541-933-2512

### **Rainier SD - 2020**

Kari Hollander, Board Chair - [karij.olsen@gmail.com](mailto:karij.olsen@gmail.com); 503-397-4555

Joseph Hattrick, Superintendent - [jhattrick@rsd.k12.or.us](mailto:jhattrick@rsd.k12.or.us); 503-556-3777

### **Sheridan SD - 2020**

Scott Burke, Board Chair - [scott.burke@sheridan.k12.or.us](mailto:scott.burke@sheridan.k12.or.us); 503-490-7263

Dorie Vickery, Superintendent - [dorie.vickery@sheridan.k12.or.us](mailto:dorie.vickery@sheridan.k12.or.us); 971-261-6959

### **Silver Falls SD - 2020**

Jonathan Edmonds, Board Chair - [Edmonds\\_jonathan@silverfalls.k12.or.us](mailto:Edmonds_jonathan@silverfalls.k12.or.us); 503-856-5370

Scott Drue, Superintendent - [drue\\_scott@silverfalls.k12.or.us](mailto:drue_scott@silverfalls.k12.or.us); 503-873-5303

### **South Lane SD - 2020**

Sherry Duerst-Higgins, Board Chair - [sherr@duerst-higgins.com](mailto:sherr@duerst-higgins.com); 541-953-6689

Yvonne Curtis, Superintendent - [Yvonne.curtis@slane.k12.or.us](mailto:Yvonne.curtis@slane.k12.or.us); 541-942-3381 x 131

### **Yamhill-Carlton SD - 2020**

Susan FitzGerald, Board Chair - [fitzgerald.susan263@gmail.com](mailto:fitzgerald.susan263@gmail.com); 503-662-4832

Bill Rhoades, Superintendent - [rhoadesb@ycschools.org](mailto:rhoadesb@ycschools.org); 503-852-6980

### **Camas Valley SD - 2019**

Rochelle Herberger, Board Chair - [ylowmom@gmail.com](mailto:ylowmom@gmail.com); 541-430-0226

Don Wonsley, Superintendent - [don.wonsley@camasvalley.k12.or.us](mailto:don.wonsley@camasvalley.k12.or.us); 541-445-2131

### **Days Creek SD - 2019**

Troy Michaels, Board Chair - [michaelsranch@frontier.com](mailto:michaelsranch@frontier.com); 541-825-3760

Diane Swingley, Charter Board Chair - [dswingley@citlink.net](mailto:dswingley@citlink.net); 541-825-3352

Steve Woods, Superintendent - [steve.woods@dayscreek.k12.or.us](mailto:steve.woods@dayscreek.k12.or.us); 541-825-3296

### **Jefferson 14J SD - 2019**

Kaye Jones, Board Chair - [kaye.jones@jefferson.k12.or.us](mailto:kaye.jones@jefferson.k12.or.us); 541-327-3514

Brad Capener, Superintendent - [brad.capener@jefferson.k12.or.us](mailto:brad.capener@jefferson.k12.or.us); 541-327-3337

### **North Douglas SD - 2019**

Jeff Frieze, Board Chair - [jdfrieze10@gmail.com](mailto:jdfrieze10@gmail.com); 541-670-9427

Terry Bennett, Superintendent - [terry.bennett@northdouglas.k12.or.us](mailto:terry.bennett@northdouglas.k12.or.us); 541-836-2223

**Creswell SD - 2019**

Mike Anderson, Board Chair - [mikpen7@hotmail.com](mailto:mikpen7@hotmail.com); 541-915-6286

Michael Johnson, Superintendent - [mjohnson@creswell.k12.or.us](mailto:mjohnson@creswell.k12.or.us); 541-895-6000

**Cove SD - 2018**

Steve McLean, Board Chair - [stevemclean.dmd@gmail.com](mailto:stevemclean.dmd@gmail.com); 541-568-4256

Earl Pettit, Superintendent - [earl.pettit@covesd.org](mailto:earl.pettit@covesd.org); 541-568-4424

**Klamath County SD - 2018**

Jill O'Donnell, Board Chair - [odonnellj@kcsd.k12.or.us](mailto:odonnellj@kcsd.k12.or.us); 541-891-5179

Glen Szymoniak, Superintendent - [szymoniakg@kcsd.k12.or.us](mailto:szymoniakg@kcsd.k12.or.us); 541-883-5000

**Mitchell SD - 2018**

Miesha Bennett, Board Chair - [alaskamlb@hotmail.com](mailto:alaskamlb@hotmail.com); 541-462-3022

Vince Swagerty, Superintendent - [vswagerty@mitchell.k12.or.us](mailto:vswagerty@mitchell.k12.or.us); 541-462-3311

**Oakridge SD - 2018**

Tami Edmunds, Board Chair - [tedmunds@oakridge.k12.or.us](mailto:tedmunds@oakridge.k12.or.us); 541-913-1600

Reta Doland, Superintendent - [rdoland@ohswarriors.net](mailto:rdoland@ohswarriors.net); 541-782-2813

**Reedsport SD - 2018**

Eric Brandon, Board Chair - [ebrandon@reedsport.k12.or.us](mailto:ebrandon@reedsport.k12.or.us)

Jon Zwemke, Superintendent - [jzwemke@reedsport.k12.or.us](mailto:jzwemke@reedsport.k12.or.us); 541-271-3656

**Forest Grove SD - 2018**

Kate Grandusky, former Board Chair - [kgradusky@fgsd.k12.or.us](mailto:kgradusky@fgsd.k12.or.us); 503-359-5746

Valyrie Ingram, Board Chair - [valyriewenzl@hotmail.com](mailto:valyriewenzl@hotmail.com)

Dave Parker, Superintendent, - [dparker@fgsd.k12.or.us](mailto:dparker@fgsd.k12.or.us); 503-359-2427

**North Marion 15 SD - 2017**

Patrick McArthur, former Board Chair - [Patrick.mcarthur@nmarion.k12.or.us](mailto:Patrick.mcarthur@nmarion.k12.or.us);

Heidi Torian, Board Chair - [heiditorian@yahoo.com](mailto:heiditorian@yahoo.com)

Ginger Redlinger, Superintendent - [ginger.redlinger@nmarion.k12.or.us](mailto:ginger.redlinger@nmarion.k12.or.us); 503- 678-7100

**Jefferson County 509J SD - 2017**

Laurie Danzuka, Board Chair - [ldanzuka@509j.net](mailto:ldanzuka@509j.net)

Ken Parshall, Superintendent - [kparshall@509j.net](mailto:kparshall@509j.net); 541-475-6192

**Pleasant Hill 1 SD - 2017**

Wylda Cafferata, Board Chair - [wyldac@gmail.com](mailto:wyldac@gmail.com); 541-937-3114

Scott Linenburger, Superintendent. - [slinenberger@pleasanthill.k12.or.us](mailto:slinenberger@pleasanthill.k12.or.us); 541-746-9646



# Search History

---

## 2022 (*in progress*)

- Arco Iris Spanish Immersion School
- Coos Bay SD
- Coquille SD
- Corbett SD
- Imbler SD
- Morrow County SD
- Oakland SD
- Vernonia SD
- Woodburn SD

## 2021

- Bandon SD
- Central Curry SD
- Crow-Applegate-Lorane SD
- Dayville SD
- Lone SD
- Junction City SD
- Mt. Angel SD
- Sweet Home SD
- Yamhill-Carlton SD
- Colton SD (interim)
- Enterprise SD (interim)
- Falls City SD (interim)
- South Coast ESD (interim)
- Spray SD (interim)
- Woodburn SD (interim)

## 2020

*All jointly with NextUp Leadership*

- Arlington SD
- Blachly SD
- Brookings-Harbor SD
- Dayton SD
- Eagle Point SD
- Knappa SD
- Lake County SD
- Marcola SD
- Pilot Rock SD
- Sheridan SD
- Silver Falls SD
- South Lane SD
- Corbett SD (interim)
- Philomath SD (interim)
- Rainier SD (interim)
- Yamhill-Carlton SD (interim)

## 2019

*All jointly with NextUp Leadership*

- Arco Iris Spanish Immersion School
- Camas Valley SD
- Creswell SD
- Days Creek SD
- Jefferson 14J SD
- Newberg Public Schools
- North Douglas SD
- Roseburg Public Schools
- Spray SD
- Brookings Harbor SD (interim)
- Dayton SD (interim)
- Philomath SD (interim)
- Silver Falls SD (interim)
- Woodburn SD (interim)

## 2018

- Cove SD Oakridge SD
- Forest Grove SD (*joint search with NextUp Leadership*)
- Klamath County SD
- Mitchell SD
- Reedsport SD
- South Lane SD
- Days Creek SD (interim)
- Jefferson SD (interim)
- Wallowa SD (interim)

## 2017

- Jefferson County SD 509J
- North Marion SD
- Pleasant Hill SD



# Search Comments

---

## WHAT BOARDS HAVE SAID

“Our board made a great choice in deciding to work with OSBA in our superintendent search. They quickly developed a timeline to fit our needs, assisted us at every step, and did an excellent job moderating difficult discussions. The staff quickly pivoted with the changing climate around COVID-19 to make sure we stayed on target. I have especially enjoyed the transition training with our new superintendent and board. Such a great value for the services they provide, I would not hesitate to use OSBA in a future superintendent search!”

**Marcola School District**  
Enrollment: 320

“We might have thought, once our selection was made, the executive search process was over, but no, it was not. Impressively, it became clear that you wanted the board-superintendent relationship to get off on a good track and are eager to teach us processes to meet that goal. By helping us outline board expectations of the superintendent and superintendent expectations of the board, by helping us set priorities for the new superintendent’s first three months and my reviewing basic boardsmanship with us, we are on a far firmer footing than we would otherwise have been.”

**Pleasant Hill School District**  
Enrollment: 1,000

“I wish to thank you for facilitating a flawless superintendent search for the Philomath SD. The process was thorough, methodical, and well organized. It made the administrative effort for the School Board as minimal as possible while creating excellent community engagement. Most notably, by all measures it created an excellent result.”

**Philomath School District**  
Enrollment: 1,700

## WHAT CANDIDATES HAVE SAID

“After the extensive hiring process, I believe the board knows more about me than I know myself.”

**New Superintendent, 2017**

“I appreciated the guidance and support through the selection process but more so with the trainings and directions from OSBA after I was selected; with focused guidance on building relationships with my board - a priceless resource. I believe those initial first steps are critical for a superintendents district vision and success.”

**New Superintendent, 2020**

“As a candidate my experience was great. The OSBA staff was very professional, organized and efficient. When the time comes, I will recommend the board use OSBA for their next search.”

**New Superintendent, 2020**

SECTION C

# **Sample Search Contract for Services**



# Sample Search Contract for Services

**PARTIES: Oregon School Boards Association (OSBA) (“Contractor”)**

An Oregon Non-Profit Corporation  
1201 Court St., NE, Suite 400  
Salem, Oregon 97301

**North Santiam School District (“District”)**

1155 N 3<sup>rd</sup> Ave  
Stayton, OR 97383

1. **Services.** Contractor agrees to provide Executive Search professional services to the District.
2. **Scope of Work.** The scope of the services provided by Contractor will include search consulting, facilitating, recruiting and transition services associated with a superintendent search with the position beginning work on July 1, 2022, including:
  - Attending meetings with the Board, staff, students, and community groups as necessary to carry out the search plan.
  - Working with the District leadership to establish a search calendar, facilitate meetings with Board, staff, students and community members to establish candidate qualities and qualifications, and establish a process to be used by any in-district candidates.
  - Preparing and distributing search forms and promotional material needed for collecting applications and advertising the vacancy both within the State of Oregon as well as regionally and nationally as agreed with the District.
  - Managing candidate applications and information; assist with screening applications; assist with organizing interviews; provide Board members with guidelines for interviews and reference checks; conduct reference checks at the Board’s request; organizing site visits when requested; and keeping applicants informed of their status during the search process.
  - Conducting a series of board/ superintendent workshops (up to 9 hours of professional development conducted by OSBA) to create and execute a Transition Plan for establishing a solid foundation for the new leadership team over the first six (6) months of the new superintendent’s contract.
3. **Term.** The term of this Agreement shall begin on February 3, 2022, and continue until:
 

completion of Scope of Work outlined above       ending date of \_\_\_\_\_
4. **Base Fee for Services.** District will pay a base fee for Contractor services as follows:
 

**X \$9,975**

hourly rate of \$132/hr. for professional time

hourly rate of \$35/hr. clerical support services
5. **Expenses.** District will reimburse Contractor for Contractor’s expenses incurred while providing services on the basis of actual expenses incurred including:
 

<input checked="" type="checkbox"/> mileage (at the federal rate)	<input checked="" type="checkbox"/> travel time (\$60 per hour)
<input checked="" type="checkbox"/> lodging	<input type="checkbox"/> ground transportation (rental car)
<input checked="" type="checkbox"/> meals	<input checked="" type="checkbox"/> advertising/posting fees beyond base package as agreed by District
<input type="checkbox"/> photocopying, supplies, printing, postage and shipping costs	

6. **Terms for Payment.** OSBA will provide fiscal services for the performance of this Agreement. District agrees to pay billings within 30 days after invoice on the following schedule:
- One-half of the Base Fee (\$4,987.50) upon execution of this agreement.
  - The remaining one-half of the Base Fee (\$4,987.50) plus all applicable expenses incurred in Section 5 above will be invoiced upon board approval of the new superintendent's contract.
7. **Independent Contractor Status.**
- A. Contractor is an independent contractor. This Agreement shall not be construed to establish an employer-employee relationship between the District and the Contractor, including subcontractors or employees thereof. Contractor is free to contract with other parties on other matters. Contractor will not receive any benefits normally accruing to District employees unless required by applicable law.
  - B. The manner of providing these services are under sole control of Contractor, including providing all tools and equipment necessary for the performance of these services. The services provided must, however, meet the general approval of the District and shall be subject to the District's general right of inspection and supervision in order to secure satisfactory performance.
  - C. Contractor, in carrying out the services provided under this Agreement, is not an employee of District, and as such accept full responsibility for any taxes or other obligations associated with payment for services under this Agreement.
  - D. None of the services covered by this Agreement shall be subcontracted without prior written consent of the District. Contractor shall be fully responsible to the District for all acts and omissions of any subcontractor, employee, agent or servant, whether employed directly or indirectly by Contractor. Steve Kelley and Sarah Herb may provide primary consulting services to District for this search.
8. **Worker's Compensation.** Contractor shall comply with state worker's compensation law for all employees who work under the terms of this Agreement. If Contractor hires employees, they shall provide District with certification of Workers' Compensation Insurance, with employee's liability in the minimum of \$100,000 upon request by District.
9. **Termination of Agreement.** This Agreement may be terminated under the following conditions:
- A. By written mutual agreement of all parties and may be immediate.
  - B. Upon ten (10) calendar days written notice by any party to the other.
  - C. Immediately on material breach of contract.
  - D. Upon expiration of the term specified above.

If this Agreement is terminated prior to the expiration date, District shall pay Contractor for services provided prior to the termination.

**Force Majeure.** Neither North Santiam School District nor Contractor shall be responsible for delay, default, or termination of contract caused by any contingency beyond their control, including, but not limited to war or insurrection (whether declared or not); plague, epidemic, pandemic, outbreaks of infectious disease or any other public health crisis, including, but not limited to quarantine or other restrictions as directed by state or federal government; compliance with any law or governmental order, rule, regulation or direction; strikes or lockouts by the Parties' own employees; walkouts by the Parties' own employees; fires; natural calamities; riots; or requirements of governmental agencies.

**Defense, Indemnity, and Insurance Provision.** Subject to any and all limitations, exclusions, and notice requirements of the Oregon Tort claims Act (ORS 30.260 through 30.300) and the constitution of the State of Oregon, each party shall be responsible for their own acts and those of its officers, employees, or agents. The parties agree that they will hold harmless, waive, release, indemnify, defend, and discharge each other from all liability and claims arising from each party's

own acts and omissions. The parties agree to this defense and indemnification to the fullest extent allowed by law, which includes liability and claims arising from negligent acts or omissions. Each party agrees to have adequate general liability coverage to cover any tort claim that could arise from this agreement including coverage for sexual molestation and injuries to the head and brain.

**Choice of Law Provision.** This Agreement shall be construed and enforced in accordance with the laws of the State of Oregon.

10. **Standard of Services.** Contractor agrees to perform services with a standard of care, skill and diligence normally provided by a professional individual in the performance of similar services. It is understood that Contractor must perform the services based in part on information furnished by District and that Contractor shall be entitled to rely on such information. Contractor agrees that the recommendations, guidance and performance of any person assigned under this Agreement shall be in accordance with professional standards and the requirements of this Agreement. District agrees not to take any action which will adversely interfere with Contractor's ability to perform to this standard.
  
11. **Guarantee.** Provided the District follows the steps outlined in the search process proposed by Contractor and engages in good faith attempts to recruit and retain a new chief executive officer, but one is not hired, or if the new chief executive officer leaves for any reason prior to completing two (2) years of service and the District has followed the Transition Plan proposed by Contractor, Contractor will conduct a new search for the cost of all advertising and marketing and travel expenses only.
  
12. **Written Notice.** Any notice of termination or other communication having a material effect on the performance of this Agreement shall be served by U.S. Mail or by confirmed e-mail delivery on the signatories listed below at the addresses listed above.

**It is agreed.** Date: February 3, 2022

**OREGON SCHOOL BOARDS ASSOCIATION (Contractor)**



\_\_\_\_\_  
Steve Kelley, Director of Board Development and Executive Searches

**It is agreed.** Date: \_\_\_\_\_

**NORTH SANTIAM SCHOOL DISTRICT (District)**

\_\_\_\_\_  
Alisha Oliver, Board Chair



## Overview

Provide superintendent search services for the North Santiam School Board to help them recruit and hire a new superintendent of schools for their district.

## Scope of Work

### Superintendent Search Services (Menu Approach)

Below is a list of the ten major activities that comprise a superintendent search. BTC creates a custom menu approach for your search and will work within your timelines and desired activities. If BTC is selected for this search, we offer the following options (at the price points listed below). Your school board can determine which activities you would like to have as a part of your search.

1. Board involvement & training
2. Custom application
3. Recruitment
4. Community involvement
5. Candidate screening (which includes reference checking)
6. First round of interviews (if the pool is large)
7. Visitations (Candidate & District)
8. Final Interview and selection
9. Final background checks
10. Contract Negotiation

**The ten services above contain the following detailed activities:**

- 80
- Determine timeline for an open or closed search based upon the board's direction.

**Prepared For**  
Tonia Whisman  
North Santiam School District

**Proposal Number**  
0000074

**Proposal Date**  
02/09/2022

- Meet with the Santiam school board to determine candidate characteristics, and provide anti-bias/ decision-making training, if requested.
- Post link to the application on the North Santiam school district website and recruit applicants for the posting.
- Conduct an electronic community survey to determine preferred characteristics of the new superintendent.
- Screen applicants and provide a strengths and weaknesses profile for each applicant.
- Develop a process for all board members to score applications virtually.
- Facilitate a meeting with full school board to select individuals to interview (Executive Session)
- Coordinate and schedule interviews with selected applicants.
- Facilitate interviews with selected applicants and assist the board with selecting finalists. (Executive Session)
- Coordinate Visitation Days for candidates and board members.
- Conduct background and reference checks on finalists.
- Facilitate interviews for finalist candidates. (Executive Session)
- Board votes in public on selected finalist and contract.
- Conduct background and reference checks on finalists.
- Assist with contract negotiation between top candidate and district attorney.

## Pricing

Description	Rate	Qty	Line Total
1. Provide Board Training 4 hours recommended	\$400.00	4	\$1,600.00
2. Create and post online application Includes all posting fees	\$1,000.00	1	\$1,000.00
3. Recruitment of Candidates Includes advertising flyer and personal outreach	\$1,000.00	1	\$1,000.00
4. Community Involvement Electronic Survey, Listening Sessions, Outreach, Analysis, and presentation of data	\$2,500.00	1	\$2,500.00
5. Candidate Screening Includes Reference Checking and Profile Pages	\$1,500.00	1	\$1,500.00

6. Round I Interviews 6 to 8 candidates	\$1,500.00	1	\$1,500.00
7. Visitation Days Coordination of Activities	\$1,000.00	1	\$1,000.00
8. Final Interviews Executive Session	\$1,000.00	1	\$1,000.00
9. Final Background Checks Work with district	\$500.00	1	\$500.00
10. Contract Negotiation Work with attorney	\$500.00	1	\$500.00
1 Year of GROW Executive Coaching Support for the new superintendent	\$2,500.00	1	\$2,500.00

Subtotal 14,600.00

Tax 0.00

---

**Proposal Total (USD) \$14,600.00**

---

## Notes

This proposal comes with one year of GROW mentoring and coaching support along with a satisfaction guarantee. If the North Santiam School Board does not vote to extend the selected candidate's first contract renewal, BTC is willing to perform the next search (up to \$10,000 of services) at no charge.

## Terms

10% down upon signing of contract. Remainder upon signed contract of the new superintendent.

---

Tonia Whisman, North Santiam School District



DR. ROBERT HESS, CEO

**BTC VISION:**

*We help executives and their teams achieve breakthrough results.*

**BTC MISSION:**

We provide the following services and supports to organizations looking to improve:

- G.R.O.W. Coaching for key leaders
- Executive searches for superintendents, principals, and other key leaders
- Keynotes, Retreats, Trainings, and Workshops on a variety of topics
- Survey tools, data analysis, grant management, and HR support
- Custom designed Electronic Evaluation/Feedback systems for employees

**BTC RESULTS & RECOMMENDATIONS:**

- Founded in 2018 by Dr. Hess, a former teacher, principal, and superintendent
- BTC events/projects to date: #38
- Author of 4 books and The 5 Pillar Exceptional Teacher Evaluation System®

Jeff DeFranco, President  
Lake Tahoe Community College  
Email: [defranco.ltcc.edu](mailto:defranco.ltcc.edu)  
Phone: 541-520-7393

Barry Jahn, Board Chair  
Oregon Virtual Academy  
Email: [bjahn@orvaboard.org](mailto:bjahn@orvaboard.org)  
Phone: 503-559-5356

Bryan Starr, Superintendent  
Harrisburg School District  
Email: [bryan\\_starr@harrisburg.k12.or.us](mailto:bryan_starr@harrisburg.k12.or.us)  
Phone: 541-995-6626

Mike Johnson, Superintendent  
Creswell School District  
Email: [mjohnson@creswell.k12.or.us](mailto:mjohnson@creswell.k12.or.us)  
Phone: 541-556-8251

Cathy Hurowitz, Superintendent  
Clatskanie School District  
Email: [churowitz@csd.k12.or.us](mailto:churowitz@csd.k12.or.us)  
Phone: 503-728-0587

Mark Witty, Superintendent  
Baker School District  
Email: [mark.witty@bakersd.org](mailto:mark.witty@bakersd.org)  
Phone: 541-620-2109

Iton Udosenata, Assistant Superintendent  
Salem Keizer School District  
Email: [udosenata@salkeiz.k12.or.us](mailto:udosenata@salkeiz.k12.or.us)  
Phone: 541-543-6545

Jamie Stiles, Executive Director  
Oregon Virtual Academy  
Email: [jstiles@oregonva.org](mailto:jstiles@oregonva.org)  
Phone: 503-730-2493

Dave Kline, Interim Superintendent  
Colton School District  
Email: [klined@colton.k12.or.us](mailto:klined@colton.k12.or.us)  
Phone: 503-991-1423

Craig Hawkins, Executive Director  
Coalition of Oregon School Administrators  
Email: [craig@cosa.k12.or.us](mailto:craig@cosa.k12.or.us)  
Phone: 541-228-6736



## Dr. Robert T. Hess

### HOME

29348 SE Carroll Dr.  
Corvallis, OR, 97333

### PHONE

C: 541.409-5012

### EMAIL

[robhess70@gmail.com](mailto:robhess70@gmail.com)

## Profile

My primary area of expertise is building leadership capacity in others to achieve breakthrough results for students. I am an innovative visionary leader who is dedicated to taking actions that deliver results. I have a proven track record of improving graduation rates, attendance rates, student achievement, and equity outcomes for all students. I have deep experience with school & district improvement, educational reform, data analysis, process management, foundation development, state reform, systems improvement, and community engagement. I have nine years of experience as a superintendent, six years at the district office level, eight years as a principal, and ten years as a teacher.

Through my consulting company I have worked with superintendents and leaders around the state in a coaching capacity including executive searches. I have mentored and trained dozens of leaders to become administrators through Lewis and Clark including seeing multiple cohorts of students through the entire process of becoming successful administrators.

## Experience

### **HR ADMINISTRATOR 4J SCHOOL DISTRICT; EUGENE, OR — 2018-2021**

I am currently an HR Administrator with Eugene 4J school district. In my current capacity I support licensed staff in the area of labor relations, teacher evaluation, performance management, and hiring/recruitment for the district.

### **BREAKTHROUGH CONSULTING, LLC — 2018-2021**

I am the founder and CEO of BreakThrough Consulting which is a network of educational leaders whose mission is to support public school superintendents to achieve extraordinary results. We have relationships and contracts in the states of Oregon and California. More details about our work can be reviewed at [www.rhess.us](http://www.rhess.us).

### **SUPERINTENDENT OF LEBANON COMMUNITY SCHOOL DISTRICT; LEBANON, OR — 2009-2018**

Responsible for the achievement and success of eight schools representing 4,100 students. Developed a community vision process to determine a vision, mission, and strategic plan for the school district. Engaged the community through the Lebanon Schools Foundation, No Limits Event, Opportunity Community, Gift of Literacy Project, and CTE revitalization. Consistently saw overall increases in reading and math achievement throughout the district. Implemented AVID district-wide to support college and career readiness. Implemented an administrator training program and mentor program for teachers. Mentored, coached, and supervised all principals. Certified trainer for Visible Learning. Developed and led data analysis workshops to support and increase data fluency throughout the district.

Achievements I am most proud of during my tenure as the superintendent of Lebanon schools:

- Creating 2020 Vision with significant community input and putting together a blueprint for district improvement (Fall 2010).



**DR. ROBERT HESS, CEO**

**BTC VISION:**

*We help executives and their teams achieve breakthrough results.*

**BTC MISSION:**

We provide the following services and supports to organizations looking to improve:

- G.R.O.W. Coaching for key leaders
- Executive searches for superintendents, principals, and other key leaders
- Keynotes, Retreats, Trainings, and Workshops on a variety of topics
- Survey tools, data analysis, grant management, and HR support
- Custom designed Electronic Evaluation/Feedback systems for employees

**BTC RESULTS & RECOMMENDATIONS:**

- Founded in 2018 by Dr. Hess, a former teacher, principal, and superintendent
- BTC events/projects to date: #38
- Author of 4 books and The 5 Pillar Exceptional Teacher Evaluation System®

Jeff DeFranco, President  
Lake Tahoe Community College  
Email: [defranco.ltcc.edu](mailto:defranco.ltcc.edu)  
Phone: 541-520-7393

Barry Jahn, Board Chair  
Oregon Virtual Academy  
Email: [bjahn@orvaboard.org](mailto:bjahn@orvaboard.org)  
Phone: 503-559-5356

Bryan Starr, Superintendent  
Harrisburg School District  
Email: [bryan.starr@harrisburg.k12.or.us](mailto:bryan.starr@harrisburg.k12.or.us)  
Phone: 541-995-6626

Mike Johnson, Superintendent  
Creswell School District  
Email: [mjohnson@creswell.k12.or.us](mailto:mjohnson@creswell.k12.or.us)  
Phone: 541-556-8251

Cathy Hurowitz, Superintendent  
Clatskanie School District  
Email: [churowitz@csd.k12.or.us](mailto:churowitz@csd.k12.or.us)  
Phone: 503-728-0587

Mark Witty, Superintendent  
Baker School District  
Email: [mark.witty@bakersd.org](mailto:mark.witty@bakersd.org)  
Phone: 541-620-2109

Iton Udosenata, Assistant Superintendent  
Salem Keizer School District  
Email: [udosenata@salkeiz.k12.or.us](mailto:udosenata@salkeiz.k12.or.us)  
Phone: 541-543-6545

Jamie Stiles, Executive Director  
Oregon Virtual Academy  
Email: [jstiles@oregonva.org](mailto:jstiles@oregonva.org)  
Phone: 503-730-2493

Dave Kline, Interim Superintendent  
Colton School District  
Email: [klined@colton.k12.or.us](mailto:klined@colton.k12.or.us)  
Phone: 503-991-1423

Craig Hawkins, Executive Director  
Coalition of Oregon School Administrators  
Email: [craig@cosa.k12.or.us](mailto:craig@cosa.k12.or.us)  
Phone: 541-228-6736



## Dr. Robert T. Hess

### HOME

29348 SE Carroll Dr.  
Corvallis, OR 97333

### PHONE

C: 541.409-5012

### EMAIL

[robhess70@gmail.com](mailto:robhess70@gmail.com)

## Profile

My primary area of expertise is building leadership capacity in others to achieve breakthrough results for students. I am an innovative visionary leader who is dedicated to taking actions that deliver results. I have a proven track record of improving graduation rates, attendance rates, student achievement, and equity outcomes for all students. I have deep experience with school & district improvement, educational reform, data analysis, process management, foundation development, state reform, systems improvement, and community engagement. I have nine years of experience as a superintendent, six years at the district office level, eight years as a principal, and ten years as a teacher.

Through my consulting company I have worked with superintendents and leaders around the state in a coaching capacity including executive searches. I have mentored and trained dozens of leaders to become administrators through Lewis and Clark including seeing multiple cohorts of students through the entire process of becoming successful administrators.

## Experience

### **HR ADMINISTRATOR 4J SCHOOL DISTRICT; EUGENE, OR — 2018-2021**

I am currently an HR Administrator with Eugene 4J school district. In my current capacity I support licensed staff in the area of labor relations, teacher evaluation, performance management, and hiring/recruitment for the district.

### **BREAKTHROUGH CONSULTING, LLC — 2018-2021**

I am the founder and CEO of BreakThrough Consulting which is a network of educational leaders whose mission is to support public school superintendents to achieve extraordinary results. We have relationships and contracts in the states of Oregon and California. More details about our work can be reviewed at [www.rhess.us](http://www.rhess.us).

### **SUPERINTENDENT OF LEBANON COMMUNITY SCHOOL DISTRICT; LEBANON, OR — 2009-2018**

Responsible for the achievement and success of eight schools representing 4,100 students. Developed a community vision process to determine a vision, mission, and strategic plan for the school district. Engaged the community through the Lebanon Schools Foundation, No Limits Event, Opportunity Community, Gift of Literacy Project, and CTE revitalization. Consistently saw overall increases in reading and math achievement throughout the district. Implemented AVID district-wide to support college and career readiness. Implemented an administrator training program and mentor program for teachers. Mentored, coached, and supervised all principals. Certified trainer for Visible Learning. Developed and led data analysis workshops to support and increase data fluency throughout the district.

Achievements I am most proud of during my tenure as the superintendent of Lebanon schools:

- Creating 2020 Vision with significant community input and putting together a blueprint for district improvement (Fall 2010).

## Dr. Robert T. Hess

### HOME

29348 SE Carroll Dr.  
Corvallis, OR 97333

### PHONE

C: 541.409-5012

### EMAIL

[robhess70@gmail.com](mailto:robhess70@gmail.com)

- Implementing the Gift of Literacy program that provides a new book to every 1st grader in the district (Spring 2011-2018).
- Increasing AP offerings and participation from 25 students in 2009 to 495 students taking 655 classes through 14 different course offerings in 2017-18.
- Increasing access to AP coursework for students of color and poverty to match the demographics of the school. Only 1% of the high schools in America have achieved this feat.
- Increasing the 4 year cohort graduation rate from 46 percent (2009) to 80 percent (2018).
- Creating the Attendance Team ("A" Team) to improve attendance, grades, and behavior outcomes at LHS (Fall 2017).
- Building effective alternative programs to meet the needs of students who learn in non-traditional ways (2013-2018).
- Creating a district strategic plan that has measurable outcomes, evidence, and results that is reviewed and reported on bi-annually. (2017-18)
- Implementing AVID K-12 districtwide to improve college acceptance and attendance rates and create college-going cultures in all schools (2013-2018).
- Improving and expanding participation in the number of CTE programs offered and the number students participating in those programs (2009-2018).
- Never laying off an employee (2009-2018).
- Partnering with the Boys and Girls Club to create a Pre-School option for high poverty families. (2016-2018).

### **ASSISTANT SUPERINTENDENT FOR ACHIEVEMENT AND PROCESS, SPRINGFIELD PUBLIC SCHOOLS; SPRINGFIELD, OR — 2008-2009**

Extensive training and development of Process Management and Quality Data Tools to improve the efficiency and effectiveness of all district departments and services. Designed and implemented a K-12 Response to Intervention (Rtl) model of instructional engineering in the areas of literacy, math, and positive behavior. Restructured special education services via the Community Model to be inclusive of all students and teachers to ensure more effective outcomes for special education students. Responsible for all state reporting including the development of the Continuous Improvement Plan (CIP) and board policy.

### **STUDENT ACHIEVEMENT LEADER, SPRINGFIELD PUBLIC SCHOOLS; SPRINGFIELD, OR — 2005-2008**

Developed and implemented a teacher evaluation program in collaboration with teachers and administrators. Awarded and managed the S-QEM (Springfield Quality Education Model) grant to develop innovative programs and projects throughout the district. Helped develop and support the Academy of Arts and Academics, an arts magnet charter school designed to meet the needs of disengaged students to inspire and

## Dr. Robert T. Hess

### HOME

29348 SE Carroll Dr.  
Corvallis, OR 97333

### PHONE

C: 541.409-5012

### EMAIL

[robhess70@gmail.com](mailto:robhess70@gmail.com)

prepare them for college success. Implemented the Gift of Literacy Project to provide a hard-bound book and college experience for every 1st grader in Springfield. Developed a budget priority process for determining school funding needs and applied that model in times of resource addition and reduction. Designed school profile notebooks and trained administrators on how to locate and use data to make instructional decisions. Wrote several state and federal grants including: teacher mentoring, art integration, character education, and small school reform. Led and supported the restructuring of two large, comprehensive high schools via schedule changes so they could offer more credits to students and prevent dropouts. Supported the restructuring of a half day alternative program into a full day, small high school diploma option for at-risk students. Implemented a closing the achievement gap project targeting African American students.

### **AUTHOR, CONSULTANT, SPEAKER, UNIVERSITY PROFESSOR; BREAKTHROUGH SCHOOLS — 2004-2018**

Founded Breakthrough Schools a grass roots network dedicated to helping schools and districts achieve breakthrough school improvement results. Taught classes at the University of Oregon, Oregon State University, Willamette University, and Lewis & Clark College on the following subjects: teacher leadership, professional development for administrators, school improvement planning, data analysis for school improvement, priority leadership, research for education, and many others. Authored (and co-authored) four books about educational reform, school improvement, and leadership. Contracted with various districts and educational organizations for presentations and professional development activities. Developed one-day interactive workshops on the following topics: Advanced Data Toolkit, The 5 Talents and 5 Skills of Exceptional Teachers, and Priority Leadership. Became an Associate with No Excuses University and provided participants with extensive training on teacher leadership and data-driven decision making. Developed the QSI (Quality School Improvement Framework) for designing a continuous progress model of education that focuses on student need and quality of product/quality of experience indicators. Certified trainer in Visible Learning, a school improvement model based on the research of Dr. John Hattie. Participated for three years in ContinUo (two years as a coach). ContinUo is a week-long executive leadership training seminar that focuses on transformational change in schools. Consulted for the following schools/organizations:

- Eugene School District
- Winston-Dillard School District
- Catlin Gable School
- True North Consulting
- Turnaround Consulting
- COSA
- Lutheran Regional Association of Christian Schools
- Corvallis School District
- Baker School District
- Amity School District
- San Juan School District (Washington)

## Dr. Robert T. Hess

### HOME

29348 SE Carroll Dr.  
Corvallis, OR 97333

### PHONE

C: 541.409-5012

### EMAIL

[robhess70@gmail.com](mailto:robhess70@gmail.com)

### **K-8 PRINCIPAL, PIONEER SCHOOL; LEBANON, OR — 2002-2005**

Helped plan, design, and open a new K-8 school of 500 students. Within two years, 90% of all the students met or exceeded state benchmarks in math and reading in this school-wide Title school where 70% of the students qualified for free & reduced lunch. In the third year, 95% of all students met or exceeded state benchmarks. Became known regionally as a demonstration site for the effective implementation of PBS (Positive Behavior Support) and received visitors from surrounding schools and international acclaim for the effective implementation of Positive Behavior Support. Received a Best Practices award from the Confederation of School Administrators for our innovative and effective low cost after school program. Supported staff in designing and implementing innovative programs and practices involving technology, service learning, natural resources, multi-age/grade level grouping strategies, and small group instruction.

### **MIDDLE SCHOOL PRINCIPAL, LEBANON MIDDLE SCHOOL — 1999-2002**

Within two years led a school identified in need of improvement due to low-test scores to a strong rating on the Oregon State Report card. Founded the Day of Caring, a service learning event that involved the entire school and was recognized by SOLV as the best cleanup program in the state involving youth. Supported the passage of the Lebanon Community Schools bond that was responsible for building two new schools and renovating all of the other schools in the district.

### **ASSISTANT PRINCIPAL, LEBANON HIGH SCHOOL — 1997-1999**

Responsible for school wide discipline and supporting the freshman Core program that teamed teachers and students to maximize planning and instructional teaming. Helped develop and implement a positive school culture that was responsive to student, teacher, and community needs to that everyone had an opportunity to be successful.

### **TEACHER, LANGUAGE ARTS; GRADES 7 THROUGH 12 — 1987-1997**

Taught a variety of courses, subjects, and grade levels related to reading, writing, speaking, and language arts. Effective educator in diverse settings ranging from El Sereno Junior High (large urban school with high poverty) in East Los Angeles to East Linn Christian Academy (small private rural school) to Lebanon High School (public suburban).

## Education

Continuing Administrator's License; University of Oregon — 2006

Doctor of Education in Educational Leadership; University of Oregon — 2003

Basic Administrator's License; University of Oregon — 1997

Master of Arts in Education; Oregon State University — 1996

Teaching License, Language Arts; California State University in Los Angeles — 1990

Bachelor of Arts in English Literature; Biola University in Los Angeles — 1986

## Dr. Robert T. Hess

### HOME

29348 SE Carroll Dr.  
Corvallis, OR 97333

### PHONE

C: 541.409-5012

### EMAIL

[robhess70@gmail.com](mailto:robhess70@gmail.com)

## Educational Achievements

### **COSA: CENTRAL OFFICE ACHIEVEMENT AWARD — 2008**

Nominated and recognized as the Central Office Administrator of the year by the Oregon Confederation of School Administrators (COSA) for work involving teacher evaluation, student achievement, and district improvement.

### **MAN OF THE YEAR, LEBANON, OR — 2011**

Selected as Man of the Year by the Chamber of Commerce of Lebanon, Oregon.

### **REFERENCES:**

Karen Hardin, HR Director, 4J (current supervisor): 541-729-1849 • Dr. Gustavo Balderas, Superintendent: 503-998-9479 • Russ McUne, Board Chair multiple years, Lebanon Schools: 541.619.6933 • Richard Borden, Board Chair multiple years, Lebanon Schools: 458.223.0113 • Jerry Williams, Board Member Lebanon: 541.401.1953 • Ryan Noss, Superintendent Corvallis, formerly supervised: 541.619.8109 • Bryan Starr, Superintendent Harrisburg, (503) 508-3712 • Cathy Hurowitz, Superintendent Clatskanie, (541) 728-0587 • Mark Witty, Superintendent Baker City (541) 620-2109

### **AUTHOR & PRESENTER**

#### **CORWIN BOOKS**

*The Data Toolkit: Ten tools for supporting school improvement, 2011*: Through extensive examples and best practices from the field, readers understand and are able to use ten practical data tools to improve data analysis and determine actions teams can take that will result in school and district improvement through the PLC process.

#### **ROWMAN EDUCATION PUBLISHER**

*Follow the Teacher: Making a difference for school improvement, 2007*: Emphasizes the critical role teacher leaders play in all school improvement efforts. Includes stories of teacher leaders and provides activities to support the development of teacher leadership.

*Priority Leadership: Generating school and district improvement through systemic change, 2006*: Presents ten continuums necessary for systemic change and improvement along with an assessment tool that enables readers to see where they are on the continuums and set goals for improving their leadership skills that will result in improved outcomes.

*Excellence, Equity, and Efficiency: How principals and policy-makers can survive the triangle of tension, 2005*: Explores the tension that exists in the quest for excellence, equity, and efficiency and provides educators with a framework for resolving the conflict based upon research and evidence from high performing schools and principals.

#### **BTC BLOG**

Chief author of the BreakThrough Consulting Blog with articles posted on the following topics: AVID, Attendance, Book Reviews, COVID 19, Consulting, Culture, Decision-Making, Diversity, Equity, Heroes, Leadership, Management, Motivation, ONE Thing, Personal, Principals, Quotes, Superintendents, System Improvement, Teachers, The 5 Pillars (2018-2020). The BTC Blog can be accessed at this site: <https://rhess.us/btc-blog>

## **STATE AND NATIONAL PRESENTATIONS — 1999-2020**

Presented at a variety state and national conferences on the following topics:

- *Equity in Action: Diversifying the 4J Teaching Force*
- *Supporting Superintendents with SIA prep and planning*
- *Through the Death Zone: How coaching can save your career*
- *New Superintendents Institute: Building Community & Board Relations*
- *Visible Principals: A framework of excellence*
- *Demystifying SB290: The power of effective educators*
- *The Data Toolkit: Using data to improve schools*
- *Principal and Teacher Effectiveness: Coming to a theater near you!*
- *Building a Community Vision*
- *Principal's Institute: Priority Leadership*
- *Training, Hiring, and Evaluation: Creating systems to generate improvement and reform*
- *Advanced Data Tools: Improve your PLCs through data tools*
- *Community Matters: Using PLCs to increase student achievement results*
- *Priority Leadership: Using the framework to assess leadership potential*
- *Radical School Improvement: Using data and collaboration to drive improvement*
- *Follow the Teacher: The power of teacher leadership*
- *Professional Learning Communities: Using data and teamwork to improve outcomes*
- *COSA New Administrator Training: Effective budgeting and hiring*
- *Closing the Achievement Gap through the Reorganization of Time*
- *The Triangle of Tension: How principals can balance excellence, equity, and efficiency*
- *The Effects of Retention: A Case Study*
- *Student Achievement System: Rejecting social promotion and retention*
- *Teacher Evaluation: Professional growth and accountability*
- *Using Service Learning to Touch the Community*

# North Santiam School District



## SUPERINTENDENT SEARCH PROPOSAL

February 9, 2022



February 9, 2022

Alisha Oliver, Board Chair  
North Santiam School District  
1155 N 3rd Ave Stayton, OR 97383

Dear Members of the North Santiam School District Board of Education:

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

**NATIONAL REACH – LOCAL KNOWLEDGE:** HYA has more experience in identifying quality educational executives than any other firm in the industry. The fact that it has assisted boards with successful selections in more than 1,500 searches with student enrollment ranging from less than 500 students to upwards of 640,000 is no accident. HYA’s success is about people: our Associates, their extensive contacts, and the Boards we assist. We build relationships with each new search, expanding our reach and our record of success.

**COMMITMENT to DIVERSITY:** HYA commits to identifying, supporting, and placing school and district leaders of color and gender who have long been historically underrepresented in these posts. Many of our associates have served or currently serve as members of the Board of ALAS (Association of Latino Administrators and Supervisors), NABSE (National Alliance of Black School Educators), and their State affiliations. Candidates hired with HYA assistance are of varied gender, race, culture, ethnicity and religious background.

**RESEARCH BASED COMMUNITY ENGAGEMENT:** HYA gives you the option to gain in depth information from your community through a research-based survey that includes national norms. The survey identifies the goals, needs, and priorities of the school system to help better match a candidate’s skills with the needs of the District and gives valuable information to the new leader on day one of employment. HYA understands that materials published to constituents must be detailed and clear; the survey report reflects that the superintendent search process is part of a disciplined approach that HYA has carefully designed over 30 years of executive search engagements.

**EXPOSURE and ANALYTICS:** HYA clients know that they are getting immediate exposure through the HYA Active Searches page which gets over 25,000 page views per month. In addition, HYA can provide analytics on your HYA Active Searches job posting including how many views your job has received, on what days, the average amount of time your posting was viewed etc. No other firm has the infrastructure to provide this data to their clients.

Sincerely,



Glenn “Max” McGee, Ph.D., President HYA

## INTRODUCTION

Hazard, Young, Attea and Associates, (HYA) proposes to conduct a national search for talented and highly qualified candidates for the position of Superintendent of Schools for North Santiam School District (hereinafter referred to as District).

This document serves to clearly outline the specific services, deliverables and costs proposed for North Santiam School District.

## FIRM INFORMATION

Hazard, Young, Attea & Associates (HYA) has more experience in identifying quality education executives than any other firm in the industry. The fact that the firm has assisted Boards with successful selections in more than 1,500 searches with student enrollment ranging from less than 500 students to upwards of 640,000 is no accident. HYA began working with rural, urban and suburban school Boards 35 years ago in an effort to assist them in recruiting highly qualified candidates and finding a leader that is the right fit for the district. HYA's success is about people: our Associates, their extensive contacts, and the Boards we assist. We build relationships with each new search, expanding our reach and our record of success.

The large quantity of searches our firm conducts per year puts us at a competitive advantage. The search volume places our firm and its Associates in more frequent contact with potential candidates, many of whom may not be actively seeking employment but are then known to the Associates and can thus be recruited when or if an appropriate position arises. In addition to your local HYA team, clients have a network of 100+ Associates from throughout the United States who assist with the firm's mission to provide aggressive, thorough, and quality assistance to school Boards in need of identifying and recruiting highly qualified executives for superintendencies and other administrative positions.

HYA is committed to engaging a diverse cadre of associates and candidates ever since it was established in 1987. Many HYA associates have served and/or currently serve as members of and Board of Directors of ALAS (Association of Latino Administrators and Superintendents), NABSE (National Alliance of Black School Educators) and other associations across the country. HYA is proud of the diversity of candidates hired with its assistance, including individuals of varied gender, race, ethnicity, culture, and religious background. HYA commits to identifying, supporting, and placing school and district leaders of color and gender who have long been historically underrepresented in these posts.

## SCOPE OF SERVICES

HYA shall provide the following services and deliverables.



### Engage Phase

HYA takes great pride in its commitment to community engagement and thoroughness of the processes used to gather input. The firm has a strong reputation for deep and meaningful engagement through its stakeholder forums, community interest group meetings and individual interviews. HYA also employs a research-based survey tool that is customizable and available in world languages. There is a lot of science involved in crafting an effective and reliable survey; the resulting survey report is presented with disaggregated data by stakeholder group and identifies the goals, needs and priorities of the school system along with the desired characteristics of its next leader. The *Community and Leadership Profile Report* is sophisticated and immediately publishable for your community. An example of the report is included with this proposal.

HYA has a history of successful virtual/video-based engagement. HYA has extensive experience and expertise conducting video interviews, focus groups, forums, meetings, candidate presentations, meet and greets, and community Q&A sessions. In addition, the firm has reported and presented to school Boards at public meetings and in closed sessions using the whole array of video platforms.

The Engage Phase is a disciplined and inclusive approach that seeks first to understand what students, staff, parents, Board and community members need and desire from their school district and Superintendent. HYA engages both internal and external stakeholders using virtual or face to face interviews, focus groups, forums, and surveys. The goal is to gather information from all stakeholders to identify the strengths of the district/community and current and foreseeable district/community challenges within a research-based framework to match the right leader with your school district.

Depending on the Board's selections for the Engage Phase, some of the most important deliverables include the following:

- Summary of the planning meeting with the Board that details the timeline and steps of the search process and decisions made by the Board;
- *HYA Community and Leadership Profile Survey and Survey Report*, if desired and paid

- for by the Board;
- Findings from individual consultant days (up to 4 days) for interviews, focus groups, and/or town hall meetings;
- *Leadership Profile Report* and *Desired Characteristics* based on the data from the survey, interviews, focus groups, meetings with the Board and other material made available to the associates.



## Recruit Phase

HYA uses a myriad of recruiting techniques to ensure all potential candidates are reached. Without spending a dollar on advertising, HYA clients know that they are getting immediate exposure through the HYA Active Searches page with over 25,000 page views per month. In addition, HYA provides analytics on your job postings including how many views your job has received during a specific period of time, the average amount of time your posting was viewed, etc. No other firm has the infrastructure to provide this data to their clients.

HYA offers optional national and regional advertising packages. Given the volume of searches HYA conducts each year and our preferred pricing, our options provide our client districts national advertising packages at rates below what they could purchase in the marketplace. The costs are detailed in the advertising services schedule in the *Signature Search Brochure*.

In addition to national and regional advertising, HYA utilizes the firm's extensive national network of Associates. HYA Associates throughout the country are aware of outstanding Superintendents and aspiring Superintendents in their state and region and maintain close professional relationships with many educators and school district leaders who might be interested in making a job change or career move. HYA Associates have ongoing relationships with state and national superintendent organizations including AASA (The School Superintendent's Organization), ALAS (Association of Latino Administrators and Superintendents) and NABSE (National Alliance of Black School Educators).

Associates are kept informed of the searches the firm is conducting and we seek recommendations from them regarding candidates who fit the profile being sought for that district. The proof of our recruiting network and efforts is the fact that approximately two thirds of the candidates ultimately selected by Boards with whom we work were recruited for the position rather than applied or self-nominated. The deliverables during the recruitment phase include:

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

Reference checking is one of the most important tasks in the search process. We begin with the informal references of referrals for potential candidates. Once an individual moves to the level of a potential candidate through the application process or through recommendations and recruitment efforts, we begin our vetting process. This includes contacting the listed references on the application or provided by the candidate. While this step is necessary it is not sufficient as most candidates will provide references that will provide only highly favorable comments. We continue the vetting process by conducting comprehensive internet searches to review any public information regarding the candidates. HYA Associates conduct confidential reference calls to obtain deep insight on any candidate that would be recommended to the Board for consideration. Given our network of Associates and many professional relationships, it is likely that we know someone who either knows the candidate directly or knows someone who knows the candidate. These references often provide confidential, hard-to-obtain information about the candidate that is invaluable in determining whether to recommend the candidate to the Board.



### Select Phase

HYA believes that the Associates are responsible for supporting the School Board in all phases of the search. This is particularly true during the interview process for semi-finalists and finalists because we want the Board members focused on assessing the candidates, not managing logistics. The Associates are available during the interview process to ensure that all runs smoothly and to facilitate debriefing the interviews and what the Board learned about the candidates. But it is the Board's decision and sole discretion to hire or not hire a particular candidate and the Board takes responsibility for that decision. Some of the specific deliverables during this phase include:

- Present a slate of candidates, the number of candidates to be determined by the Board with a recommendation from HYA;

- Conduct the Interview Workshop and provide materials and protocols to ensure informative effective Board interviews;
- Schedule interviews for the Board with selected semi-finalists and finalists;
- Facilitate Board discussion to narrow candidate pool after each round of interviews;
- Coordinate and provide optional third party, independent investigative background check(s) of candidates as selected.

Upon completion of screening interviews conducted, the Associates present a select slate to the Board. The number of candidates on the slate will have been determined by the Board during the initial planning meeting. Prior to presenting the slate (or in a separate advance session, if preferred), the Associates will conduct a seminar for the Board designed to prepare for candidate interviews. This seminar will include written guidelines and protocols to ensure informative and comprehensive interviews. Approximately one to two hours in length, the seminar will also review the steps in the final stages of the search.

Prior to this workshop, HYA will solicit questions, hypothetical situations and/or topics of interest, identified by the Board as desirable topics of discussion for the Board's initial interviews with the candidates. Such feedback will be developed into an Interview "Script", which will be reviewed and revised during the aforementioned workshop and then used by the Board during the first round of interviews. The second interviews are generally unscripted and designed to follow-up on topics and questions identified during the first interviews.

The Associates will facilitate each decision-making session of the Board, if desired. Such involvement permits more active engagement by all Board members in both the general search process and the specific dialogue regarding the candidate pool. In facilitating the decision-making process, HYA assists the Board in assessing the abilities of the respective candidates in relation to the criteria identified by the Board.

Two additional steps are recommended towards the end of the selection process, before any public announcement: a comprehensive independent background check by an outside firm and a site visit. The comprehensive background checks can be conducted on the single finalist or on the three semi-finalists that the Board brings back for second interviews. These are not simple background checks by searching a social security number. The due diligence background checks are conducted by a third-party entity and include checking on issues related to criminal and civil court records, driving records, college degrees and university accreditations. They can also include print and social media reviews. The site visit is optional and is typically completed on the sole finalist once a selection is made but before a contract is signed.



## Transition Phase

At the conclusion of the selection process, HYA offers a combination of included services and optional services to assist with the transition of the new superintendent. The included services are:

- Communicate with all unsuccessful candidates at the close of the search and the appointment of the new superintendent;
- Assist the Board in announcing the appointment of the new superintendent;
- Hold a transition meeting with the new Superintendent regarding information learned throughout the search process and next steps in the transition process;
- Offer other transition services to be considered by the Board and if desired, paid for by the Board. These services include Executive Coaching, Board Governance Training, Superintendent Evaluation and Strategic Planning.

## THE SEARCH TEAM

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

HYA Associate	Cell Phone	Email
Dr. Robin Winslow	208-407-8055	robinwinslow@hyasearch.com

Daneyelle Martell, serves as project manager and can be reached at 847-744-5632 and [daneyellemartell@hyasearch.com](mailto:daneyellemartell@hyasearch.com)

**Robin D. Winslow, Ed.D.** has over forty years of experience in public education, serving in a state administrative association, in higher education and K-12 systems as an executive director, principal, teacher, coach, researcher, and professor. During his executive director tenure, the Idaho Association of School Administrators effectively supported superintendents, principals and special education directors throughout the state of Idaho. Under his leadership, the association was able to build partnerships with other educational associations and businesses in forming a statewide collaborative effort for K-12 educational issues. Dr. Winslow is currently a professor and the Program Coordinator for Educational Leadership Program at Boise State University.

## REFERENCES

HYA’s reputation for effectiveness and integrity is extremely important. The following references were chosen because the district is of similar size to your district or is in the State or Oregon. In addition to the references listed below, an extensive list of national searches our firm has completed since 2016 is attached. Our references will attest that phone calls from Board members and the Superintendent are picked up or returned immediately regardless of the time of day. Emails are returned in a matter of hours, and questions are answered in detail. Our team works for you and with you.

<b>District Name and State</b>	<b>Reference Name Contact Information</b>
Aspen School District (CO) 1,700 students, PK-12	Susan Marolt 970.379.8732 smarolt@aspenk12.net
Lebanon Community Schools (OR) 4,340 students, K-12	Tom Oliver tom.oliver@lebanon.k12.or.us
Piedmont USD (CA) 2,706 students, K-12	Andrea Swenson 510.697.8567 aswenson@piedmont.k12.ca.us
Bend LaPine School District (OR) 16 000 students	Melissa Barnes Dholakia 541-419-9991 Melissa.barnesdholakia@schoolboard.bend.K12.or.us
Klamath Falls City Schools (OR) 3,000 students, K-12	Mychal Amos 541.883.6263 Mychal.Amos@skylakes.org
Greater Albany Public Schools (OR) 9,600 students, K-12	Jennifer Ward 541.730.2270
Medford School District (OR) 14,000 students, K-12	Cynthia Wright Cynthia.Wright@medford.k12.or.us
Portland Public Schools (OR) 49,200 students, PK-12	Amy Kohnstamm 503.913.3945

## FEES

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

- Consulting Fee for the search in the amount of \$16,500. This fee is due in three installments:

- 50% will be invoiced upon execution of the contract/letter of agreement
- 25% will be invoiced upon presentation of the *Leadership Profile Report*
- 25% will be invoiced upon presentation of the slate
- Associate Expenses for travel will be reimbursed by the Board. Mileage reimbursement is based on current IRS guidelines.

**Optional Additional Services:**

<b>Service:</b>	<b>Included in Fee:</b>	<b>Optional Enhancements:</b>
On-site Associate days	Four days	Additional on-site consulting days billed at \$2,500/day as selected and paid for by the Board.
Community Engagement	Interviews, Focus Groups, Town Hall Meetings as decided by the Board.  Survey and report of findings.  Effective Superintendents White Paper.	Research Based Survey, in English and Spanish, with Community and Leadership Profile Survey Report.  Add customized questions up to 3 open-ended and 10 forced questions for \$1,000.  Professionally translated (not Google Translate) survey in world languages for \$415 per language.
Advertising	Advertising on HYA’s webpage (over 25,000 page views on our Active Searches page per month) and social media pages.	HYA has designed advertising packages to maximize exposure for the vacancy. Options and pricing for additional advertising services are attached.
Reference/ Background Checks	HYA Associates screen and conduct reference checks on candidates.	HYA highly recommends an independent, third-party due diligence background check be used on the finalist(s). The cost ranges from \$1100 - \$1950 per candidate. See Due Diligence Services in the Signature Search Brochure.

**Other Considerations:**

If the Board chooses to reimburse candidates for travel for interviews, candidates will submit the expenses directly to the District for reimbursement.

HYA is a green corporation and provides all search materials online. If the Board requests hard copies of the materials, the district will be invoiced to cover the costs of any printing, binding and shipping of materials.

Recruitment for other positions; if the Board employs an HYA recruited candidate within one year of the close of the superintendent search, in addition to the position of Superintendent, 10% of the base salary will be due to HYA for the recruitment of said candidate.

## **GUARANTEES**

### **Fixed Price**

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

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

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

### **Client-Satisfaction**

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

### **Price Match**

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

---

HYA looks forward to the possibility of working with the Board and assisting with the selection of a new leader. Please contact HYA at 847-250-7261 or at [hya@hyasearch.com](mailto:hya@hyasearch.com) with questions or requests for additional information.

**Hazard, Young, Attea & Associates**

1475 E. Woodfield Rd, 14<sup>th</sup> Floor

Schaumburg, IL 60173

(847) 250-7261

**[www.hyasearch.com](http://www.hyasearch.com)**

# ROBIN WINSLOW

## EDUCATION

Ed.D.	Boise State University	2013
M.Ed.	University of Idaho	1988
B.A.	Boise State University	1981

## EXPERIENCE

2021 – Present	Associate, Hazard, Young, Attea & Associates
2020 – Present	Assistant Clinical Professor, Boise State University, Boise, ID
2011 – Present	Executive Director, Idaho Association of School Administrators, Boise, ID
2013 – 2020	Adjunct Professor, Boise State University, Educational Leadership Programs, Boise, ID
2008 – 2011	Special Lecturer, Boise State University, Educational Leadership Program, Boise, ID
2006 – 2008	Executive Director, Idaho Association of School Administrators, Boise, ID
1988 – 2006	Elementary Principal, Gooding and Boise, ID

**SELECT HYA SUPERINTENDENT SEARCH HISTORY  
WITH REFERENCES**

**2021**

0 – 2,500 students	2,501 – 5,000 students	5,001 – 7,500 students	7,501 - 15,000 students	15,000+ students
<p>Ramapo Indian Hills Regional HSD (NJ) 2,300 students, grades 9-12 Filomena Forgia 201.264.1576</p> <p>School District of Cambridge (WI) 900 students, PK-12 Tracy Smithback-Travis 608-423-4345 tsmithback@cambridge.k12.wi.us</p> <p>Ramapo Indian Hills Regional HSD, NJ 2,300 students, grades 9-12 Filomena Forgia 201.264.1576</p>	<p>Cheltenham SD, PA 4,500 students, PK-12 Pam Henry 215.446.5253</p>		<p>Ankeny Community School District (IA) 12,500 students, PK-12 Aaron Jonson 515.556.4277</p> <p>Bedford County Public Schools (VA) 9,500 students, K-12 Susan Mele 540.797.4423 susan.mele@bedford.k12.va.us</p> <p>Coeur d'Alene Public Schools (ID) 11,000 students, PK-12 Jennifer Brumley 208.661.4208 jbrumley@cdaschools.org</p> <p>Lower Merion SD, PA 8,000 students, K-12 Lucy Klain 215.680.3055</p>	<p>Albuquerque Public Schools (NM ) 84,000 students, PK-12 David Peercy 505.362.6834 peercy_d@aps.edu</p> <p>Allentown School District (PA) 16,500 students, K-12 Nancy Wilt 484.707.6496</p> <p>Jefferson County Public Schools (CO) 80,000 students, PK-12 David Bell 303.881.7497 david.bell2@jeffco.k12.co.us</p> <p>Loudoun County Public Schools (VA) 81,000 students, PK-12 Brenda Sheridan 571-233-0307 Brenda.Sheridan@lcps.org</p>

## SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

2020

0 – 2,500 students	2,501 – 5,000 students	5,001 – 7,500 students	7,501 - 15,000 students	15,000+ students
<p>Aspen School District (CO) 1,700 students, PK-12 Susan Marolt 970.379.8732 smarolt@aspenk12.net</p> <p>Collingswood PS (NJ) 2,300 students, PK-12 Regan Kaiden 917.549.2738</p> <p>Hopkinton SD (NH) 1,000 students, PK-12 Seth Aframe 603.856.3534</p> <p>Maple Dale-Indian Hill SD (WI) 490 students, K-8 Ryan Jenness 414.322.7983</p> <p>Maplewood-Richmond Heights SD (MO) 1,700 students, PK-12 Katie Kaufmann 314.313.5670 katie.kaufmann@mrhschools.net Maria Langston 314.520.5666 maria.langston@mrhschools.net</p> <p>Oyster Bay-East Norwich Central SD (NY) 1533 students, PK-12 Laurie Kowalsky laurie.Kowalsky@aol.com</p> <p>San Bruno Park School District (CA) 2,500 students, PK-8 Teri Chavez tchavez@sbpsd.k12.ca.us</p> <p>Whitewater Unified School District (WI) 1,923 students, PK-12 Casey Judd 920.723.3035 cejudd@idcnet.com</p>	<p>Homewood City School District (AL) 4,200 students, K-12 Charlie Douthit 205.368.7925</p> <p>Summit Public Schools (NJ) 4,100 students, K-12 Donna Miller donnamiller@summit.k12.nj.us</p>	<p>Capital School District (DE) 6,000 students, PK-12 Chanda Jackson-Short 302-465-1151</p> <p>Fond du Lac SD (WI) 7,000 students, K-12 Dr. Susan Jones 920-979-1364 joness@sb.fonddulac.k12.wi.us</p> <p>Pemberton Township Schools (NJ) 5,000 students, PK-12 Tom Bauer 609.410.8399</p> <p>Verona Area SD (WI) 5,800 students, K-12 Meredith Christensen 847.724.8465 christem@verona.k12.wi.us</p>	<p>Norwalk Public Schools (CT) 11,500 students, PK-12 Sarah LeMieux 203.988.4294 lemieuxs@norwalkps.org</p> <p>Richland SD 400 (WA) 13,600 students, PK-12 Rick Jansons 509.528.3488 rick.jansons@rsd.edu</p> <p>Salinas City Elementary SD (CA) 9,000 students, PK-6 Amy Ish.831.262.6860 aish@salinascity.k12.ca.us</p> <p>Traverse City Area Public Schools (MI) 10,000 students, PK-12 Sue Kelly 231.218.9800</p>	<p>Atlanta Public Schools (GA) 52,000 students, PK-12 Jason Esteves 404.421.6215 jesteves@atlantapublicschools.us</p> <p>Clear Creek Independent SD (TX) 44,000 students, K-12 Laura DuPont laura-dupont@ccisd.net</p> <p>Fort Wayne Community Schools (IN) 29,600 students, PK-12 Julie Hollingsworth 260.750.0274</p> <p>Green Bay Area School District (WI) 20,300 students, PK-12 Eric Vanden Heuvel 920.655.8993 epvandenheuvel1@gbaps.org</p> <p>Sioux Falls School District (SD) 24,000 students, PK-12 Cynthia Mickelson 605.376.1329 cynthia@mickco.com</p>

**SELECT HYA SUPERINTENDENT SEARCH HISTORY  
WITH REFERENCES**

**2019**

<b>0 – 2,500 students</b>	<b>2,501 – 5,000 students</b>	<b>5,001 – 7,500 students</b>	<b>7,501 - 15,000 students</b>	<b>15,000+ students</b>
<p>Las Lomitas Elementary SD (CA) 1,300 students, K-8 John Earnhardt john.earnhardt@gmail.com</p> <p>Malverne Union Free School District (NY) 1,700 K-12 students Danielle Hopkins 516-216-3514</p> <p>Portola Valley School District (CA) 600 students, PK-8 Jeff Klugman jklugman@pvdsd.net</p> <p>Watchung Borough School District (NJ) 650 students, PK-8 Jessica Ingrassia 323-420-9280</p> <p>Wyoming City Schools (OH) 1,950 students, K-12 Jeanie Zoller 513.379.3767</p>	<p>Berkeley Heights Public Schools (NJ) 2,700 students, K-12 Doug Reinstein 908-531-8181 dreinstein@bhpsnj.org</p> <p>Center School District (MO) 2,700 students, PK-12 Rebecca Lahann 816.456.1793 rlahann@center.k12.mo.us</p> <p>Freeport School District 145 (IL) 4,100 students, PK-12 Janice Crutchfield 815.238.8449 janice.crutchfield@fsd145.org</p> <p>Lebanon Community Schools (OR) 4,340 students, K-12 Tom Oliver tom.oliver@lebanon.k12.or.us</p> <p>New Milford Public Schools (CT) 3,947 students, PK-12 Angela C. Chastain angela@angelachastain.com</p> <p>Mountain View-Los Altos HSD (CA) 4,300 students, 9-12 Dr. Phil Faillace 650.248.3375</p> <p>Rockville Centre UFSD (NY) 3,600 students, K-12 Tara Hackett 516-660-8400 tarahackettboe@gmail.com</p> <p>Willingboro School District (NJ) 3,400 students, PK-12 Kelvin Smith 609.902.2902</p>	<p>Port Washington Union Free SD (NY) 5,500 students, PK-12 Nora Johnson 917-690-9908 njohnson@portnet.org</p> <p>Wenatchee Public Schools (WA) 7,700 students, PK-12 Sunny Hemphill hemphill.sunny@wenatcheeschools.org</p>	<p>Bayonne Public Schools (NJ) 9,800 students, PK-12 Joseph Broderick 201-988-1447 jbroderick@bboed.org</p> <p>Central Kitsap Schools (WA) 11,000 students, PK-12 Jeanie Schulze 360.908.5001</p> <p>Fairfield Public Schools (CT) 10,000 students, PK-12 Nick Aysseh 203.442.7255 naysseh@fairfieldschools.org</p> <p>Greater Albany Public Schools (OR) 9,627 students, K-12 Jennifer Ward 541.730.2270</p> <p>Medford School District (OR) 14,000 students, K-12 Cynthia Wright Cynthia.Wright@medford.k12.or.us</p> <p>Sewanhaka Central HSD (NY) 8,500 students, 7-12 David Del Santo 646.938.6500</p>	<p>ALAS (Association for Latino Administrators &amp; Superintendents), Washington D.C. Annie Ortiz 860.729.4749</p> <p>Academy School District 20 (CO) 26,200 students, PK-12 Tracey Johnson 719.491.2633 Karin Nelson 719.491.2633</p> <p>Denver Public Schools (CO) 92,000 students, PK-12 Anne Rowe annerowe60@gmail.com</p> <p>Edison Township Public Schools (NJ) 16,000 students, K-12 Ralph Errico ralph.errico@edison.k12.nj.us</p> <p>Glendale Unified School District (CA) 26,000 students, TK-12 Jennifer Freemon 818.388.1251 jfreemon@gusd.net Greg Krikorian 818.480.1327 gkrikorian@gusd.net</p> <p>School District of Indian River County (FL) 17,700 students, PK-12 Brian Barefoot 772.925.5333</p> <p>Prince George's County PS (MD) 130,000 students, K-12 Erica Berry Wilson EBwilson1@co.pg.md.us</p>

## SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

**2018**

0 – 2,500 students	2,501 – 5,000 students	5,001 – 7,500 students	7,501 - 15,000 students	15,000+ students
Bonny Doon Elem. School District (CA) 163 students, PK-8 Amy McCabe 831.457.9912	Flemington-Raritan Regional SD (NJ) 3,100 students, K-8 Tim Bart 908.797.7178	Boyertown Area School District (PA) 6,900 students, K-12 Steve Elsier 610-367-4697	Birmingham Public Schools (MI) 8,000 students, K-12 Kim Whitman 248.760.3011	Anaheim Elem. School District (CA) 18,000 students, K-12 Jackie Filbeck 714.883.6701
Greenburgh-Graham UFSD (NY) 150 students Jess Dannhauser DannhauserJ@graham-windham.org	Garden City School District (NY) 3,800 students, K-12 Angela Heineman 516.521.0304	Hollister School District (CA) 5,500 students, TK-8 Elizabeth Martinez emartinez@hesd.org	Chambersburg Area SD (PA) 9,000 students, PK-12 Alexander Sharpe 717.404.6179 alexander.sharpe@casdonline.org	Beaufort County SD (SC) 22,000 students, PK-12 Christina Gwozdz 843.636.8555 ChristinaGwozdz@beaufort.k12.sc.us
Live Oak School District (CA) 2100 students, K-8 Jeremy Ray jray@losd.ca	Lafayette School District (CA) 3,568 students, TK-8 Teresa Gerringe 510.599.9152	Lancaster ISD (TX) 7,200 students Ty Jones 214.802.3776	Davenport CSD (IA) 16,000 students, PK-12 Ralph Johanson 563.381.4598 rjohanson1@msn.com Bruce Potts 563.355.7388 potts@daportschools.org	Billings Public School District 2 (MT) 16,000 students, K-12 Greta Besch Moen 406.248.4360
Loma Prieta Joint Union Elementary (CA) 941 students, PK-8 Deana Arnold d.arnold@loma.k12.ca.us	Lawrence Township PS (NJ) 3,800 students, PK-12 Dana Drake 201.527.8464	Montclair School District (NJ) 6,700 students, K-12 Laura Herzog 973.699.1541 lherzog@montclair.k12.nj.us	East Aurora SD 131 (IL) 14,000 students, K-12 Kimberly Hatchett 630.881.1243	Crowley Independent SD (TX) 15,000 students, K-12 June Davis 847.437.1938
Mount Pleasant Central SD (NY) 2,000 students, K-12 Thomas McCabe 914.874.6075	Los Gatos Union Elementary SD (CA) 3,200 students, K-8 Peter Noymer 408.656.5510	Palo Alto Unified School District (CA) 8,000 students, K-12 Ken Dauber 650-906-4340 kdauber@pausd.org	Helena Public Schools (MT) 8,200 students, K-12 Sarah Sullivan 406.465.1472	Duval County Public School District (FL) 128,000 students, K-12 Warren Jones 904.390.2372 Jonesw2@duvalschools.org
Orange City School District (OH) 2,024 students, K-12 Melanie Weltman 216.378.6989 mweltman@orangecsd.org	Los Gatos-Saratoga Union HSD (CA) 3,287 students, 9-12 Robin Mano rmano@lgsuhd.org		Huntley CSD 158 (IL) 9,500 students, K-12 Tony Quagliano 847.254.2885	Ector County Independent SD (TX) 30,000 students, PK-12 Doyle Woodall, 432.553.4115 dww831@yahoo.com
Rumson-Fair Haven Regional HSD (NJ) 970 students, 9-12 Lisa Waters 732.616.0961	Park City School District (UT) 4,973 students, PK-12 Andrew Caplan acaplan@pcschools.us		Lawrence Public Schools (MA) 15,000 students, K-12 John Connolly 617-447-1302 johnronanconnolly@gmail.com	Linn Benton Lincoln Education Service District (OR) 37,000 students Heather Search 541.812.2600
	San Carlos School District (CA) 3,100 students, PK-8 Eirene Chen echen@scsd.k12.ca.us		New Bedford Public Schools (MA) 12,700 students Mayor Jonathan F. Mitchell 508.979.1410	Los Angeles USD (CA) 640,000 students, PK-12 Monica Garcia 213.505.6122 monica.garcia@lausd.net
				Newark Public Schools (NJ) 35,000 students, K-12 Josephine Garcia 973-733-7333 j4garcia@nps.k12.nj.us
				Oceanside Unified School District (CA) 20,000 students, K-12 Ann Corwin 760.213.7285
				Stafford County PS (VA) 28,650 students, PK-12 DeWayne McOsker 540.751.8809

## SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

**2017**

0 – 3,000 students	3,001 – 5,000 students	5,001 – 7,500 students	7,501 - 20,000 students	20,001+ students
<p>Bexley City SD (OH) 2,274 students, K-12 Melissa LaCroix Melissa.Lacroix@bexleyschools.org</p> <p>Harvard CUSD 50 (IL) 2,400 students, PK-12 Sandra Theriault stheriault@cusd50.org</p> <p>Hunterdon Central Regional HS (NJ) 2,990 students, 9-12 Deborah Labbadia 908.616.8588</p> <p>Madison SD (NJ) 2,604 students, K-12 Lisa Ellis 201.400.2349</p> <p>Montecito Union School District (CA) 438 students, K-6 Katy Murphy kmurphy@montecitou.org</p> <p>Orinda Union Elementary SD (CA) 2,529 students, K-8 Julie Rossiter 925.408.1780 jrossiter@orinda.k12.ca.us</p> <p>Pelham Public Schools (NY) 2,800 students, K-12 Madeline Smith 646.209.5213</p> <p>Piedmont USD (CA) 2,706 students, K-12 Andrea Swenson 510.697.8567 aswenson@piedmont.k12.ca.us</p>	<p>Beacon City Schools (NY) 3,600 students, K-12 Meredith Heuer 917.447.6562</p> <p>Chappaqua Central SD (NY) 4,000 students, K-12 Allison Gardner 914.409.7696</p> <p>Concord Public Schools &amp; Concord-Carlisle Regional School District (MA) 3,355 students, K-12 Johanna Boynton 978.318.1500</p> <p>Duxbury Public Schools (MA) 3,250 students, PK-12 Anne Ward, awarddux@verizon.net</p> <p>Jefferson UHSD (CA) 4,750 students, 9-12 Rosie Tejada 415.250.5123</p> <p>Manhasset Union Free SD (NY) 3,300 students, K-12 Regina Rule 914.602.1483</p> <p>North Shore SD 112 (IL) 4,309 students, PK-8 Eric Ephraim 847.541.0076</p> <p>Rescue Union SD (CA) 3,766 students, PK-8 Nancy Brownell, 916.769.7417</p> <p>Rye City SD (NY) 3,384 students, K-12 Katy Keohane Glassberg glassberg.katy@ryeschools.org</p>	<p>Franklin Public Schools (MA) 5,447 students, PK-12 Kevin O'Malley 774.571.8486</p> <p>Hempstead Union Free School District (NY) 6,000 students, PK-12 Maribel Touré 516.434.4000</p>	<p>Alexandria City Public Schools (VA) 15,000 students, PK-12 Ramee Gentry 703.899.2637</p> <p>Clarke County SD (GA) 13,500 students, PK-12 Charles Worthy, 706.255.7795</p> <p>Crowley ISD (TX) 15,200 students, PK-12 June W. Davis 817.292.6092</p> <p>Cupertino USD (CA) 18,500 students, PK-12 Anjali Kausar 408.827.8336</p> <p>El Rancho USD (CA) 8,800 students, PK-12 Jose Lara 562.991.4868</p> <p>L'Anse Creuse PS (MI) 12,000 students, K-12 Amy Servial 586.822.9302 amyservial@gmail.com Dr. Terri Spencer 248.520.0334 tmsedd@gmail.com</p> <p>Pleasanton Unified SD (CA) 15,000 students, PK-12 Joan Laursen 925-339-1763</p> <p>Richland SD (WA) 13,400 students, K-12 Rick Jansons, 509.528.3488 rick.jansons@rsd.edu</p> <p>Sequoia Union HSD (CA) 9,000 students, 9-12 Carrie DuBois cdubois@cbnorcal.com</p>	<p>Fairfax County PS (VA) 183,000 students, PK-12 Sandy Evans, 571.423.1083</p> <p>Garland ISD (TX) 57,400 students, PK-12 Larry H. Glick 972.475.4000</p> <p>Midland ISD (TX) 25,000 students, PK-12 Rick Davis 432.683.6686</p> <p>Portland Public Schools (OR) 49,200 students, PK-12 Amy Kohnstamm 503.913.3945</p> <p>Richmond City SD (VA) 22,000 students, PK-12 Dawn Pope 804.402.5000 Thomas Farrell 804.513.0523</p> <p>San Diego County Office of Ed (CA) 500,000 students Gregg Robinson 619.225.0377</p>



# Signature Search Process

# The HYA Difference

## National Reach – Local Focus

Established in 1987, Hazard, Young, Attea & Associates (HYA) is one of the oldest and largest search firms having assisted more than 1,400 school boards select exceptionally talented leadership in school systems across the nation, large and small, urban and rural. HYA's reputation and experience make it one of the preeminent school search firms in the nation and a standard which others often emulate. HYA Associates are located across the country to conveniently serve clients and are thus uniquely qualified to bring local - as well as national - perspectives, knowledge, experience, and connections to each search.

## Communication

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

## Executive Oversight

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

## Research Based

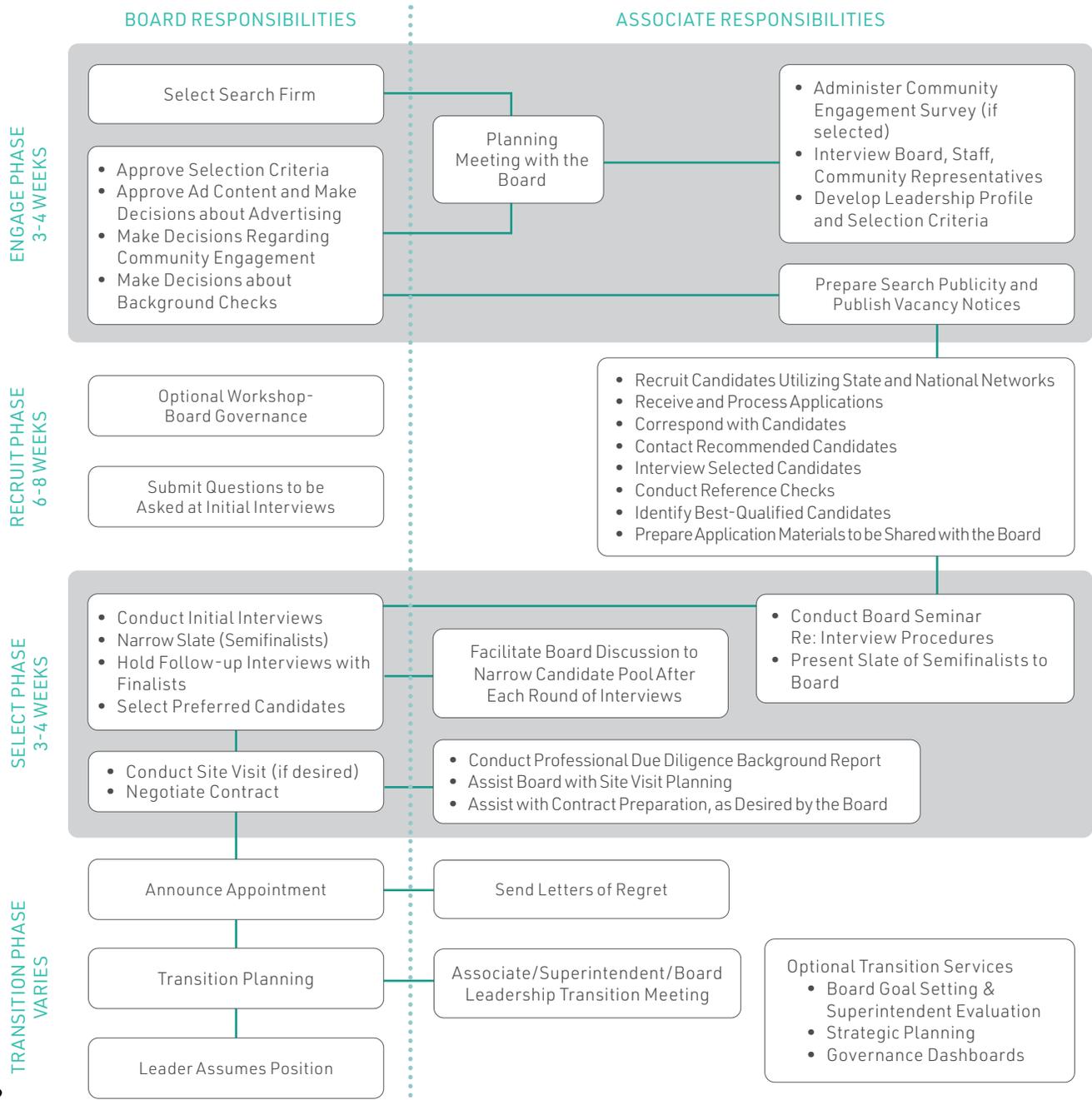
HYA has over 30 years of experience supporting school districts in improving student outcomes. HYA's community engagement process employ research-based approaches to identifying the goals, needs, and priorities of the school system along with the desired characteristics of its next leader. The Engage Phase was developed based on research on effective leadership. The resulting Community and Leadership Profile Report provides information on the current state of the District, essential information the Board will use in the selection process and the new leader can use day one of employment. Furthermore, by blending consulting, professional service, and technology, HYA offers transition services and an analytics infrastructure to help the Board and their new leader better understand the interrelationships among school functions, and the impact of decisions and expenditures on student outcomes.



# More Than a Background Check – Executive Due Diligence

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

## HYA Signature Search Process





# The Four Phases of HYA's Signature Search

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



## Engage

The Engage phase consists of designing and planning a process of engaging the Board and stakeholders through interviews, online surveys (available in world languages), and focus groups. Information from these interactions assists the Board in developing a leadership profile and selection criteria that match the priorities of the community and that meet the unique needs of the local district. This disciplined, inclusive and research-based approach ensures all stakeholders have the opportunity to be a part of the search process and provides valuable feedback about the school district based on HYA's local research and professional understanding of the district's standing in the broader marketplace. Survey options are detailed on page 7 of this brochure.





## Recruit

The Recruit phase consists of leveraging HYA's extensive national network of Associates and incorporating advertising strategies (as selected and paid for by the Board pursuant to pages 8 and 9 of this brochure) that results in the identification and recruitment of exceptionally talented leaders. HYA can also recruit non-traditional candidates, i.e. executives that have worked in business, military, private or public sector. HYA works in close partnership with state and national organizations with numerous Associates serving on those Boards.



## Select

The Select phase consists of providing the Board with a slate of candidates that were interviewed by HYA Associates using the Leadership Profile established by the Board. HYA's Associates are committed to spending the necessary time and energy on the details to find the right candidates to bring to the Board. The search team then facilitates the Board interviews and appointment process including reviewing candidates' references. HYA's ability to gain important background information regarding candidates - beyond what appears on an individual's resume - is a unique and distinguishing characteristic of HYA, and is attributable to the integrity of the firm, Associates, and the vast networks of professional relationships built through years in the education field. A workshop on interviewing and construction of interview questions is facilitated by the Associates for the Board. Executive due diligence including formal background and media checks complete the Select phase (as selected and paid for by the Board pursuant to page 10 of this brochure).



## Transition

The Transition phase consists of assisting the Board and new Superintendent to assure a successful transition. Appointing a new leader is the first step toward accomplishing organizational and student goals for success. Included in the search fee is a transition meeting with the new Superintendent and representative(s) of the Board regarding the information learned throughout the search process, in particular, the Community and Leadership Profile Survey. Additional transition services are available (as selected and paid for by the Board pursuant to page 11 of this brochure).

## The Search Team

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

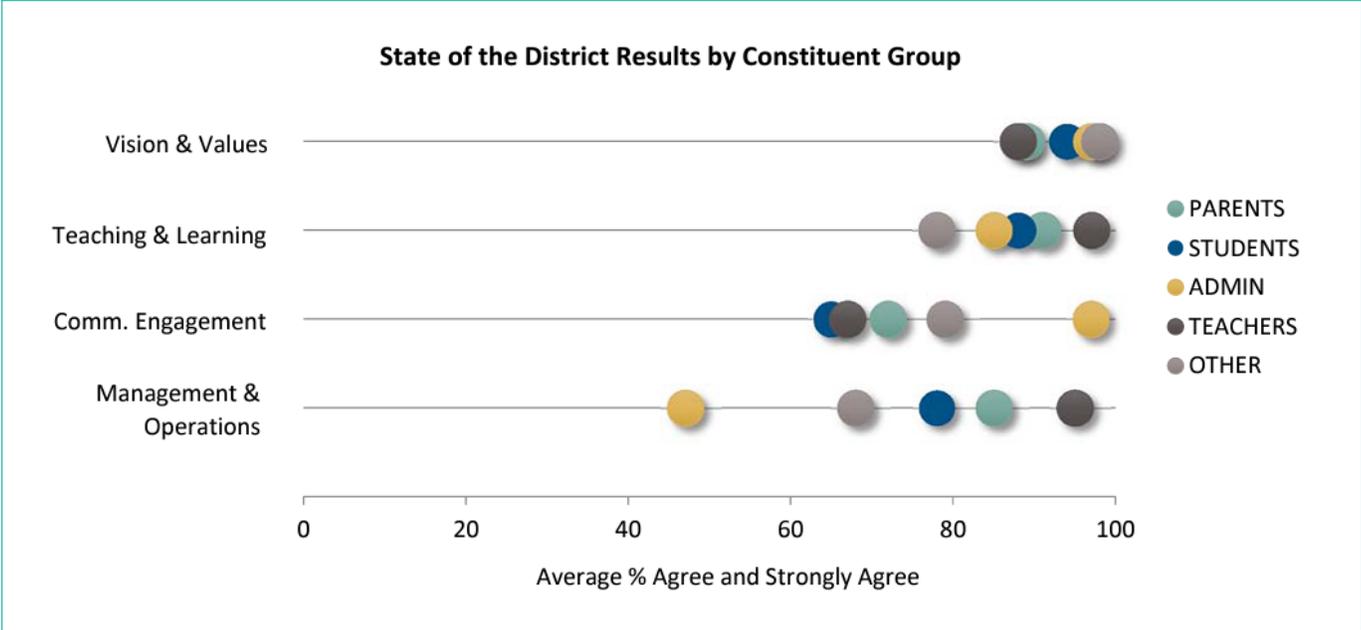
HYA assigns an individual management team to each executive search that it conducts. Associates assume direct responsibility for the search and coordinate the activities of all individuals engaged in the project. In addition to the Associates assigned to the search, all nation-wide Associates in the firm are tasked with identifying prospective candidates.

HYA has professionally staffed offices, a technological infrastructure and a full-time employed staff; thus, HYA is capable to respond to any request the Board may have on the Board's time schedule. Finally, each search has executive oversight by the HYA President and project manager to ensure no detail is overlooked. HYA's office staff, which is highly knowledgeable and pleased to assist at any time, is available to the Board from 8:00 a.m. to 5:00 p.m. CST, Monday through Friday.

HYA believes that communication and organization are critical to successful searches. Our delivery systems give the Board anytime, anywhere access to all documents regarding the search. The Board and its Associates can have confidential access to all information associated with the search in a cloud based, organized and timely manner.

# Community and Leadership Profile Survey

HYA's online survey employs a research-based approach to identifying the goals, needs, and priorities of the school system along with the desired characteristics of its next leader. The survey was developed based on research on effective leadership. There is a lot of science involved in crafting a good survey questionnaire. HYA uses a multi-stage process to design, measure change over time, and report survey findings. The Community and Leadership Profile Report is a sophisticated executive report to publish for your community. Survey responses are summarized by area, constituent group, and disaggregated at the question level.



Pricing: \$2000  
\$415 per language  
\$1000 for customization - up to 3 open-ended questions and up to 10 forced-choice questions

# Advertising Services

HYA Associates work with their clients to consider the many approaches to advertising vacant position(s). The HYA staff creates and coordinates all advertisements at the Board's direction. HYA advertising packages ensure exposure in the most frequently read print, e-publication journals, and job boards of education leaders across the country. In addition, HYA offers more focused advertisement packages for the Board to consider as add-ons to the National packages, including state and region-specific options.

All HYA search clients are advertised on the HYA Active Searches webpage and social media accounts - Facebook, LinkedIn and Twitter. The HYA Active Searches webpage averages 25,000 views per month and is a clickable list that leads its viewers to a separate page fully dedicated to your search.

## Package 1 - \$2,150

One listing in the HYA group ad in Ed Week's print publication

Online listing on AASA for 30 days with Online Spotlight, Preferred, and Featured upgrades

## Package 2 - \$3,400

Two HYA group ads in Ed Week's print publication

Online listing on EdWeek's TopSchoolJobs for 30 days & Showcased on the homepages for EdWeek and TopSchoolJobs for 7 days

Online listing on AASA for 30 days with Online Spotlight, Preferred, and Featured upgrades

## Package 3 - \$6,650

Listing in the HYA group ads in Ed Week's print publication for the length of the search

Dedicated District specific ad in Ed Week's print publication

Online listing on EdWeek's TopSchoolJobs for 30 days & Showcased on the homepages for EdWeek and TopSchoolJobs for 7 days

Online listing on AASA for 30 days with Online Spotlight, Preferred, and Featured upgrades



## Options to Complement the Advertising Packages

(Choose as many as desired.)

Careerbuilder Network - \$488	ALAS & NABSE - \$520	Custom
<p>Careerbuilder ad, linked to ASCD job ramp (Association for Supervision and Curriculum Development) for 30 days</p>	<p>Association of Latino Administrators and Superintendents (ALAS) for 6 weeks online, push on ALAS apps</p> <hr/> <p>National Alliance of Black School Educators (NABSE) for 30 days</p>	<p>Quoted price is based on number of Associations and frequency of ads to place</p>

## Regional Packages

(Regional packages give your vacancy additional exposure in a specific geographic region. National Advertising, as detailed in packages 1, 2, and 3, should still be considered.)

California - \$1,050	Northeast - \$1,050
<p>2 advertisements in the ACSA (Association of California School Administrators) EdCal CareerConnect print and 7 days online</p> <hr/> <p>CALSA (California Association of Latino Superintendents and Administrators) online advertisement for 30 days</p>	<p>NJASA (New Jersey Association of School Administrators)</p> <hr/> <p>NYSCOSS (New York State Council of School Superintendents) online and newsletter</p> <hr/> <p>CAPSS (Connecticut Association of Public School Superintendents)</p>



# Executive Due Diligence

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

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

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

	Comprehensive \$1950	Basic \$1100
Personal Profile Summary	x	x
Social Security Trace	x	x
County Criminal Record History	x	x
Federal Criminal Record History	x	x
County Civil Record History	x	x
Department of Motor Vehicles License Information	x	x
Education (Degree) Verification	x	x
Investigation of all Aliases Identified within Past 7 Years	x	x
Investigation of all Jurisdictions of Residence, Education, and Employment within Past 7 Years	x	x
University and Academic Program Accreditation	x	x
National Criminal Record History	x	x
National Sex Offender Search	x	x
Executive Summary	x	x
News Media Review (5 year timeframe and up to 20 relevant articles)	x	
Social Media Review	x	

# HYA Transition Services

HYA offers optional transition services that would benefit the Board and Superintendent. Our website contains even more information, including white papers, brochures and videos about HYA's Transition services:

<https://hyasearch.com/executive-search/transition/>

## Community Engagement & Surveys

Measurement and feedback are critical components of a quality improvement framework. Including stakeholders' voices in improvement and innovation plans ensures there is a balanced and expanded set of metrics for governance and leadership – beyond student outcomes. Focus Groups and Town Hall Meetings (whether in person or virtual) can be facilitated by the HYA team to ensure school leadership hear and learn from stakeholders' collective wisdom. Priced based on number of events.

Measuring stakeholder satisfaction through surveys help identify problems that might otherwise go unnoticed by organizational leadership, improve public trust in school systems, increase support for future programming and initiatives, and improve the overall climate and culture of the school system. Choose from our current survey instruments with the ability to customize questions. A full executive report with visual representations of the data and appendices are provided. *\$5,000 additional \$1,000 for customization. Professionally translated world languages available at \$415/language.*

## Board Governance Workshop

The Board Governance Workshop requires a half day and provides the Board the opportunity to clarify the respective roles of the Board and the Superintendent. The workshop addresses the concepts of trusteeship, governance, management, continuous improvement, and systematic change. Developing and maintaining effective Board-Superintendent relations, the need for long and short range planning, consensus decision-making, and other components of successful Board service are also discussed at this workshop. *\$2,500, includes all preparation and material.*

## Board Goal Setting & Superintendent Evaluation

To develop and maintain effective Board-Superintendent relations and provide the Board with an opportunity to determine what it desires to have the Superintendent achieve during in the position, goals and the evaluation process must be codified and understood with great clarity. The evaluation process should reinforce the concept of continuous improvement and should monitor the achievement of the Board's goals. Processes and instruments for performance evaluation will be provided. *\$5,000 (2 sessions: 1. goal setting for superintendent, 2. facilitation/review of superintendent evaluation).*

## Strategic Planning

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

## Executive Coaching

The mentoring relationship will be designed with the HYA Associate and the new Superintendent with input from the Board. There is a focus on monitoring progress towards attainment of Board goals and facilitation of the Superintendent's first year evaluation. A coach provides a neutral third party sounding board with personal experience and understanding of the demands of the position. A coach, unlike employees or family members, isn't a dependent or subordinate, but rather a person capable of giving honest feedback to help the leader achieve their goals and the goals of the organization. *\$10,000/school year.*

## Governance Dashboards

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

## Comprehensive First Year Support

This service includes the Board Governance Workshop, Executive Coaching, and Board Goal Setting & Superintendent Evaluation services. The mentoring relationship will be designed with the HYA Associate and the new Superintendent with input from the Board. There is a focus on monitoring progress towards attainment of Board goals and facilitation of the Superintendent's first year evaluation. *\$15,000/school year.*