

**WAUNAKEE COMMUNITY SCHOOL DISTRICT
BOARD OF EDUCATION SUPERINTENDENT SEARCH FIRM INTERVIEWS**

Monday, June 5, 2023

6:00 PM

Waunakee Community School District
905 Bethel Circle
Waunakee, WI 53597

Members of the public may attend Board of Education meetings in-person.

A recording of the meeting will be posted on the District webpage within 24 hours of the meeting time.

AGENDA

I. CALL TO ORDER

II. ROLL CALL

III. APPROVE AGENDA

IV. SUPERINTENDENT SEARCH FIRM INTERVIEWS

- A. 6:00PM - 6:05PM Meeting Kick-Off
- B. 6:05PM - 6:35PM BWP & Associates 3
- C. 6:35PM-7:05PM Hazard, Young, Attea Associates 23
- D. 7:05PM - 7:35PM McPherson Jacobsen, LLC 64

V. BOARD DISCUSSION / SELECTION OF FIRM

VI. HERITAGE ELEMENTARY SCHOOL MASONRY BIDS **109**

The purpose of this agenda item is to request approval of the Heritage Elementary School masonry bids. Attached please find a document with the bids on it.

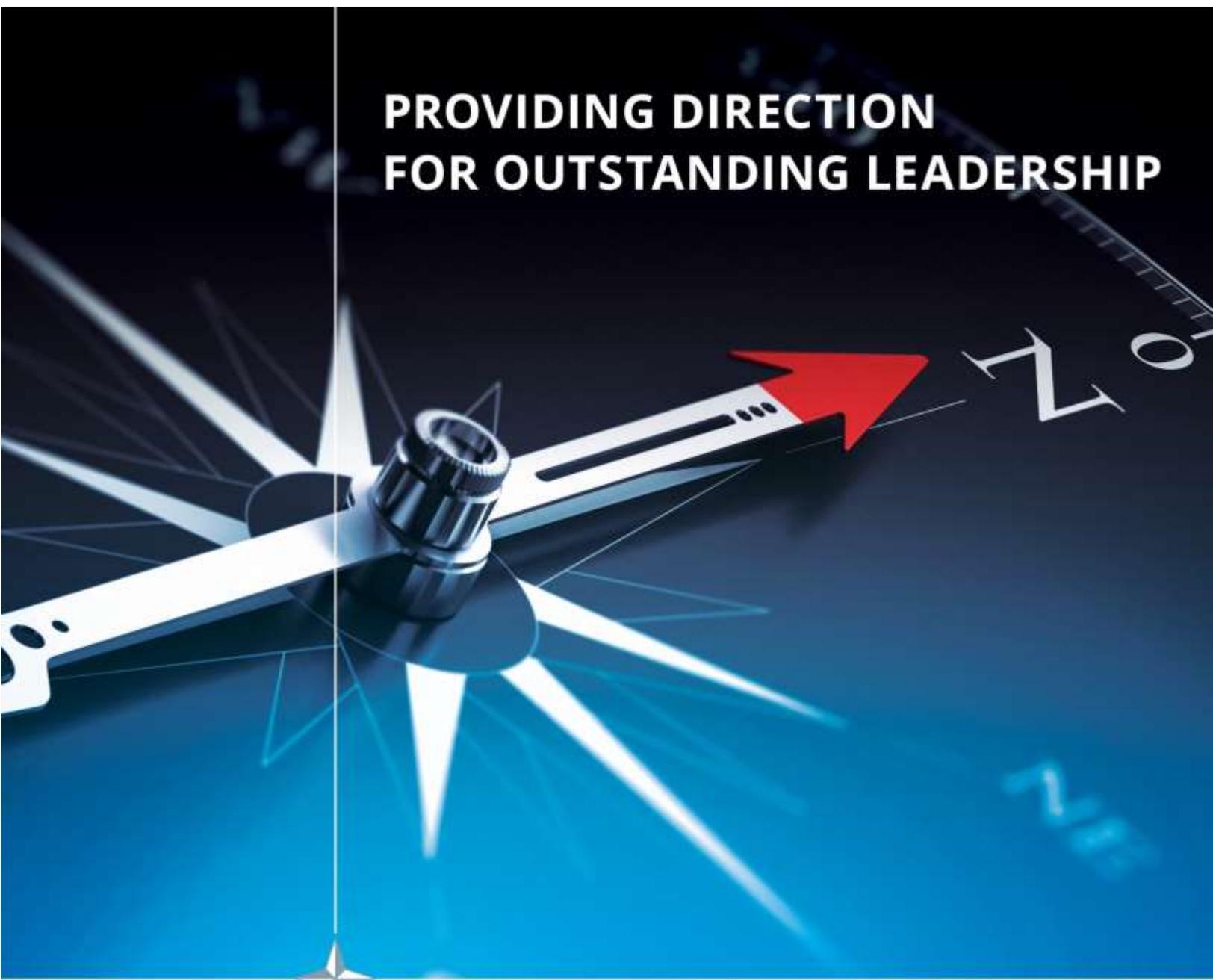
Randy Guttenburg and Steve Summers had the opportunity to attend the bid day at the Vogel Bros. location to view the process of bidding for the majority of the work at the Heritage Elementary School. Vogel is still vetting many of the bids that were received, and they will be presented at a later date. The most immediate bid process is for masonry. We are recommending the low bidder of JP Cullen.

VII. FUTURE MEETINGS

VIII. ADJOURN

“Any person who has a qualifying disability as defined by the Americans with Disabilities Act who requires assistance with access or materials should contact the Waunakee Community School District Office at 849-2000, 905 Bethel Circle Drive Waunakee, WI 53597, at least

twenty-four hours prior to the commencement of the meeting so that necessary arrangements can be made to accommodate the request.”



**PROVIDING DIRECTION
FOR OUTSTANDING LEADERSHIP**

BWP

SCHOOL ADMINISTRATOR SEARCH PROPOSAL

Waunakee Community School District

Waunakee, WI

Dr. Joseph Porto, Mr. Todd Bugnacki



May 1, 2023

Joan Ensign
Board of Education President
Waunakee Community School District
905 Bethel Circle
Waunakee, WI 53597

Dear Joan Ensign and School Board Members,

We are pleased to submit this proposal to assist Waunakee Community School District in the search for your next Superintendent of Schools. BWP & Associates is a national search firm that will provide you with an experienced search team composed of Dr. Joseph Porto and Mr. Todd Bugnacki.

Our team brings a wealth of experience and knowledge at local, state, and national levels to secure the best Superintendent for the Waunakee Community School District. In 2022-23, Dr. Joe Porto and Mr. Todd Bugnacki led two highly competitive searches that resulted in the successful placement of new leaders in both Green Bay and Mukwonago. In addition, our firm has recently completed other searches in Wisconsin, including Madison, Middleton-Cross Plains and Cedarburg.

Dr. Joe Porto is a partner with BWP, and has significant experience as a Superintendent, professor and consultant. Mr. Todd Bugnacki, retired superintendent of the Cedarburg School District, has extensive Wisconsin leadership experience and knowledge of the Waunakee community. We are excited for the opportunity to present a slate of candidates who appreciate not only your outstanding school district, but also appreciate all the Waunakee community has to offer. The team is committed to working with you and your community to identify your specific needs and to seek a group of excellent candidates for your consideration.

BWP & Associates consists of experienced and dedicated consultants who are networked with educational leaders throughout the country. We offer a high level of expertise and extensive knowledge for recruiting exceptionally talented people. Our proposal is attached and presents in detail how we will guide and support you throughout the search process. We encourage you to visit our website at www.bwpassociates.com to learn more about our search process.

We appreciate the opportunity to submit this proposal. Please feel free to contact us if you have any questions or if we can assist further as you discuss your search options.

Sincerely,

Dr. Joseph Porto
Director & Consultant
847.533.3587
jmp2211@hotmail.com

Mr. Todd Bugnacki
Consultant
414.704.2065
Tbugnacki1@gmail.com



Waunakee Community School District Superintendent Search Executive Summary

Consultants

- Dr. Joseph Porto
- Mr. Todd Bugnacki

Scope and Timeline of Services

- Phase 1: Planning and Preparation – BWP and School Board (**July 2023**)
- Phase 2: Networking and Recruitment – BWP (**August 2023**)
- Phase 3: Candidate Assessment – BWP (**September 2023**)
- Phase 4: Interviewing of Candidates – School Board (**October 2023**)
- Phase 5: Selection of Candidate and Transition Activities (**November – December 2023**)

Community Engagement

- Leadership Profile Survey available to the school community
- Focus groups of parents, community members, teachers, administrators, and students along with individual interviews of School Board members to build the Leadership Profile
- Representative stakeholder committee to meet finalists and provide written feedback to the School Board

Costs

- Consulting fee **\$19,500**
- Survey Expenses - \$350
- Social Media History on Candidates - \$600
- Approximate Office Expenses - \$600-\$800
- Advertising & Travel To be determined by the Board

Why BWP & Associates?

- 99% of superintendents placed by BWP successfully complete their first contract (usually two or three years)
- Two-year guarantee, if the new superintendent resigns or is dismissed, a new search is conducted for expenses only
- One year of free mentoring for the new superintendent
- Nationwide network of contacts, consultants, and candidates
- Each search process is customized to meet the needs of the school district
- Superior process with uncompromising professionalism

About BWP & Associates

“A national leader in providing direction for outstanding leadership.”

BWP Associates’ Goals

- To identify and present a slate of outstanding candidates for leadership positions including superintendents, district administrators, and school leadership positions.
- To ensure successful results to benefit students, staff, school boards, and stakeholders.
- To engage parents, community, staff, and students in the search process; to build support for the process, the School Board, and the successful candidate.

Company Background

BWP & Associates grew from the merger of three nationally recognized search firms: Harold Webb Associates, PNR Associates, and The Bickert Group, Ltd. BWP traces its oldest roots to Harold Webb Associates that became the first nationwide superintendent search firm in the country in 1977. PNR Associates conducted leadership searches in educational and national non-profit organizations since 1984. The Bickert Group, Ltd., incorporated in 1992, served predominately Midwest school districts. Through the merger into **BWP & Associates**, these three firms significantly expanded their connections and consultant base. BWP’s corporate office is in Libertyville, Illinois.

Additional information

- Home base is Libertyville, IL. Offices in Illinois, Texas, Washington D.C. area, and South Carolina
- Nine Partners and 40 Associates
- 45% of BWP Partners/Associates are women and/or minorities
- Partners and Associates are Superintendents – active and retired; University faculty; Former Board of Education members
- Strong connections with national and state professional organizations, such as: AASA, NASB, ASCD, IASA, IASB, IASCD, SSS, ASBO, IASBO, IALA, WASDA, WASB
- Focused on personalized, local service with a national presence
- **Goal:** to match skilled professional leaders to school districts to assure successful outcomes that benefit students, staff, school boards and stakeholders

Consultant Search Team

Team Leader and Main Contact: Dr. Joseph Porto

- Dr. Porto’s full resume is located in the Appendix A
- Dr. Porto is one of nine Directors (Partners) for BWP & Associates
- He has conducted **35** searches for BWP & Associates from 2012-2023
- Dr. Porto has experience conducting searches in large, diverse communities and has also led several *successful searches in Wisconsin*
 - 2023, Lead Consultant in the Green Bay Area Public Schools search that was successfully completed in March 2023 (approximately 19,000 culturally diverse students in 42 schools)

- 2022, Consultant in four-member team that conducted a successful superintendent search in Pittsburgh Public Schools (approximately 20,000 culturally diverse students in 43 schools)
- 2022, Lead Consultant the successfully-completed Mukwonago Area School District, Wisconsin Superintendent search (approximately 5,000 students in nine schools)
- 2019, Co-Lead Consultant of the superintendent search in Middleton-Cross Plains Area School District in Wisconsin (7,400 students in 11 schools)
- 2016, Co-Leader of the superintendent search in Cuba City Wisconsin

Search Team Member: Mr. Todd Bugnacki

- Mr. Bugnacki’s full resume is located in the Appendix A
- Mr. Bugnacki is a recently retired superintendent from Cedarburg, Wisconsin and is a new Associate for BWP
- Mr. Bugnacki has an extensive knowledge of education in Wisconsin. His impressive network of contacts, along with his involvement in state educational organizations and associations make him a valuable asset in Wisconsin searches
- Successful searches include Mukwanago, WI and Green Bay Area School District

The Search Timeline

Below are the five phases of the search and a proposed timeline, subject to Board approval.

- Phase 1: Planning and Preparation – BWP and School Board (**July 2023**)
- Phase 2: Networking and Recruitment – BWP (**August 2023**)
- Phase 3: Candidate Assessment – BWP (**September 2023**)
- Phase 4: Interviewing of Candidates – School Board (**October 2023**)
- Phase 5: Selection of Candidate and Transition Activities (**November – December 2023**)

The Search Budget and Contract

Item	Cost	Fixed/Estimate	Required/Optional
Search Fee	\$19,500	Fixed	Required
Survey Fee	\$350	Fixed	Required
Advertising	\$500-\$1,000	Estimate	Board chooses options
Office expenses	\$600-\$800	Estimate	Required
Travel-candidates	TBD	Estimate	Board chooses options
Social Media History Check	\$600	Fixed	Optional

**Will work with Board on a not to exceed amount*

- Payment Schedule
Our consultant fee is normally billed in three equal installments:
 - Upon the signing of the Letter of Understanding
 - After presentation of the slate of semifinalist candidates
 - Upon the appointment of the new Superintendent

Final expenses are billed within 90 days of completion of the search

- Contract
The standard Letter of Understanding (contract) is under Appendix B. The contract can be modified prior to signing to accommodate specific Board requirements.

Phase 1: Planning and Preparation

Initial Planning Meeting

The first step is for BWP to schedule a planning session with the Board to organize the process by:

- Reviewing the Board/BWP responsibilities for each phase of the search
- Defining the roles of the current superintendent, staff members, administrators, students, community, and other stakeholders in the search process
- Preparing a customized detailed search calendar that meets the School Board’s specific needs and defines the expectations of BWP and the Board members in the search process
- Reviewing School Board options and preferences for a position announcement and advertisement
- Discussing the compensation package to be offered to the new superintendent
- Outlining the communication plan to keep the Board abreast of the search progress and the BWP consultants alerted to questions or issues that may arise

Developing Leadership Profile: Board and Stakeholder Input

A key to finding the best candidates is to develop a unique Leadership Profile that clearly articulates the specific characteristics necessary to be successful in your school district.

- The Leadership Profile is developed collaboratively and is the product of these activities:
 - Interviews with individual Board members
 - Focus Groups with community stakeholders
 - Open meeting with community members
 - Leadership Survey for staff and community stakeholders
- The information gleaned from these four components is then synthesized into a succinct and specific Leadership Profile. The Leadership Profile becomes the primary driving force for:
 - Recruiting candidates
 - Preparing interview questions
 - Assessing interview performance
 - Final assessment of candidates

Phase 2: Networking and Recruitment

Recruitment and Advertisement

- National outreach to find a group of excellent candidates for your consideration, with emphasis on your geographic region
- Aggressive recruitment of candidates whose experiences, skillset, and educational background best match the needs of the position and community
- Consistently seeking new talent
- Announcement of the vacancy posted in strategically selected national, state, and regional publications and websites, as well as the **BWP & Associates** website www.bwpassociates.com
- Communication with our national network of professionals to identify prospective candidates
- Complimentary Internet link from the vacancy announcement and search profile provided for the school district's website

Specialize in Finding a Diverse Pool of Candidates

- Recruitment efforts occur through our wide network of industry professionals via education conferences with reputable national and local organizations such as the Wisconsin Association of School Boards (WASB), Wisconsin Association of School District Administrators (WASDA), American Association of School Administrators (AASA), National Association of Black School Educators (NABSE), the Association of Latino Administrators and Superintendents (ALAS), amongst others.
- BWP Directors frequently attend education conferences with a focus on diversity and inclusion lens. BWP makes it a part of its Annual Meeting of Directors agenda to discuss new opportunities to add Directors and Associates to the BWP team with a focus on adding members with diverse thinking.
- BWP has conducted 71 successful searches in districts with 3,000-7,000 students from 2006-23.
- BWP has a significant track record that demonstrates our ability to attract diverse candidate pools. Over the years our diverse candidate pools have resulted in the placement and retention of a significant number of diverse superintendents.

Dr. Claude Tiller – Green Bay Area Public School District, WI

Dr. Carlton Jenkins – Madison Metropolitan School District, WI

Dr. LaTanya McDade – Prince William County Public Schools, VA

Dr. Pedro Martinez – Chicago Public Schools, IL

Dr. William Copeland – Lower Merion Public Schools, Ardmore, PA

Phase 3: BWP Candidate Assessment

Candidate Assessment by BWP & Associates

At the close of the application period, the consultants will carefully review all candidate materials to identify the best candidates for your position.

- Individuals are screened using the Leadership Profile characteristics, and the selected candidates interviewed by the consultation team.
- Candidates undergo further background and detailed reference checks by the search team with adherence to strict confidentiality expectations.

- Examination of finalist candidates' backgrounds is discreet, but rigorous, reaching personal and professional reference well beyond those provided by the candidate. Extensive electronic searches, including social media and news media are thoroughly conducted with the assistance of a third-party firm, if desired.
- Comprehensive information about the candidate beyond that appearing in the official file is attributable to BWP's extensive network.

Presentation of Candidates and Board Training Meeting

After vetting all applications, BWP will present a slate of four to six candidates recommended for initial interviews by the Board. When this slate is presented, the consultants will support and assist the Board in the final stages of the process including:

- Preparing the Board for candidate interviews by providing written interview guidelines, suggested sample questions, and best practices
- Suggesting community activities appropriate to introduce finalists, if desired
- Providing a regional salary/benefits comparison to assist the Board in determining compensation
- Discussing and offering options and recommendations for the Board to conduct formal background checks of the final candidate(s)

Phase 4: Board Interviews of Candidates

School Board Interviews and Candidate Assessment

• First Round

- Board interviews the slate of candidates recommended by BWP.
- Interview questions are prepared in advance and are connected to the Leadership Profile.
- BWP provides assessment tools to the Board to assist in the determination of two to three finalists for a second interview.

• Second round

- In-depth interviews with the selected finalists are conducted.
- If desired, finalists present to the Board a response to address a pertinent issue facing the school district. Examples include a communication to the community or a presentation to the Board.
- BWP provides assessment tools to the Board to assist in evaluating the finalists.
- BWP is willing to participate in an onsite with the Board of Education, if requested.

Stakeholder Input on Final Candidates

- If requested by the Board, BWP will organize a representative community stakeholder group.
- This group will be fully prepared by BWP to interview the final candidates using the original Leadership Profile as its guiding source to elicit responses from the candidates.
- Each stakeholder participant will provide confidential, written feedback that will be reviewed and considered by the Board as part of the final consensus-building selection process.

Phase 5: Selection and Transition

Superintendent Appointment and Closing Search

- Board selects a candidate and authorizes the terms of the employment contract to be offered.
- BWP is available to assist the Board and/or its attorney in preparation of the draft contract.
- BWP sends letters to all applicants confirming the appointment and extending the Board's appreciation for applying.

Successful Leadership Transition

- BWP is available to assist the Board in ensuring an orderly transition in leadership.
- Components of a successful transition may include assistance with a first 100 days plan, a governance workshop for the Board and superintendent, and ideas for superintendent goal-setting and evaluation.

BWP Mentoring and Guarantee

- BWP provides free mentoring service which is unique in the industry.
- Consultants provide mentoring for the new superintendent for at least the first full year in the position at no extra charge.
- BWP two-year guarantee: If the new superintendent resigns or is dismissed for a cause within 24 months of commencing duties, BWP will conduct a new search at no additional cost to the Board except for expenses.

References, Litigation Record, Contract

References

BWP's reputation, integrity and effectiveness are paramount to us. Our team strongly urges you to speak with representatives of Boards that the consultants have served. Per your request, past clients are listed as references from recent searches. A more complete list is available on our website at www.bwpassociates.com.

- 1. Green Bay Area Public Schools** Green Bay, WI (19,000 students)
 - Dr. Claude Tiller, Superintendent Phone: 920-448-2000
 - Ms. Laura McCoy, School Board President
 - Email: llmccoy@gbaps.org Phone: 920-819-2741
- 2. Mukwonago Public Schools** Mukwonago, WI (5,000 students)
 - Dr. Joe Koch, Superintendent-Elect Phone: 262-970-1003
 - Ms. Erika Conner, School Board President
 - Email: conneer@masd.k12.wi.us Phone: 414-698-7595
- 3. Middleton-Cross Plains Area School District** Middleton, WI (7,000 students)
 - Dr. Dana Monogue, Superintendent Phone: 608-829-9004
 - Mr. Bob Hasselbein, School Board President
 - Email: roberth@mcpasd.k12.wi.us
- 4. School Town of Munster** Munster, IN (4,500 students)
 - Mr. Bret Heller, Superintendent
 - Mr. John Castro, Board of Trustees President
 - Email: jmcastro@munster.us Phone: 773-531-4797

5. Belvidere CUSD 100 Belvidere, IL (8,300 students)

- Dr. Cassandra Schug, Superintendent Email: cschug@district100.com
Phone: 815-544-8513
- Ms. Allison Reid-Niemiec, School Board President
- Email: areid-niemiec@district100.com

Litigation Record

BWP has never been in litigation with any of its clients.

Contract Form

BWP uses a Letter of Understanding to serve as its formal contract with clients.

Contact Us

Questions regarding this proposal may be directed to BWP President Dr. Mark Friedman at 630.624.3336 or BWP Managing Director Dr. Debra Hill at 847.204.0462. We will be glad to provide any further information, if needed.

Appendix A

Consultant Resumes

415 E. Lynnwood Ave.
Arlington Heights, IL 60004
(847)-533-3587

Vita
Joseph M. Porto, Ed.D.

PROFESSIONAL EXPERIENCE

Educational Consultant

2011-Present

JMP Consulting, Ltd.
Arlington Heights, IL

Provide expert consulting services to school districts and school boards in the areas of strategic planning, long-range technology plans, school board relations, administrative mentoring, climate and satisfaction surveys, and leadership training.

Partner/Director Executive Search Firm

2011-Present

BWP and Associates
Libertyville, IL

Conduct administrative leadership searches in the Midwestern states, including searches for superintendents, principals and central office administrators. Also offer strategic planning facilitation and board orientation services to client districts.

Clinical Assistant Professor

2011-2014

Northern Illinois University
DeKalb, IL

Teach in the graduate program for the Department of Leadership, Educational Psychology and Foundations. Classes all focus on educational administration and include both master's level and doctoral program coursework.

Superintendent of Schools

2002-2011

Avoca School District 37
Wilmette, IL

Superintendent of Schools

1995- 2002

Pleasantdale School District 107
Burr Ridge, IL

Director of Instructional Development

1993-1995

North Shore School District 112
Highland Park, IL

Elementary Principal

1989-1993

Red Oak School
Highland Park School District 108
Highland Park, IL

Elementary Principal

1986-1989

Indian Knoll School
West Chicago School District 33
West Chicago, IL

Assistant Principal

1984-1986

Cooper Junior High
Community Consolidated School District 21
Wheeling, IL

Elementary Teacher

1978-1984 Virginia Lake

School
Community Consolidated School District 15
Palatine, IL

EDUCATION

Doctor of Education, Educational Administration 1994
Northern Illinois University De Kalb, IL

Master of Science, Educational Administration 1983
Northern Illinois University De Kalb, IL

Bachelor of Arts, Elementary Education 1978
National College of Education Evanston, IL

PROFESSIONAL PUBLICATIONS AND PRESENTATIONS

Porto, Joseph M. (2022). Passion for the Beatles and the Power of Analogies. The School Administrator. April, 2022.

Porto, Joseph M. (2010). Power and Impact: The Superintendent as Student Mentor. The School Administrator. September, 2010, 40-41.

Porto, Joseph M. (2009). Using *Good to Great* to rethink planning. The Illinois School Board Journal. 77, 22-26.

“Moving From *Good to Great*: Using a New Paradigm for Strategic Planning.” Workshop presented at the T + L Technology Conference hosted by the National School Board Association, Seattle, 2008

Todd Bugnacki

Cedarburg, WI 53012
414.704.2065
Tbugnacki1@gmail.com

EDUCATION

Cardinal Stritch University, Glendale, WI
Program: Doctor in Philosophy (Ph.D.) in Leadership
Anticipated completion date summer 2023

Cardinal Stritch University, Glendale, WI
Program: Superintendentcy, Director of Special Education and Pupil Services

University of Wisconsin –Milwaukee, Milwaukee, WI
Masters of Science: Administration Leadership and Supervision, Curriculum and Instruction

Northland College, Ashland, WI
Bachelor of Arts: Education, minors in Philosophy and Religion

PROFESSIONAL EXPERIENCE

► **Superintendent**, Retired from the Cedarburg School District (2015-22), Cedarburg, WI 53012

► **Director of Curriculum and Instruction** for the Cedarburg School District (2013-15), Cedarburg, WI 53012

► **Consultant** for BlackBlack Associates (2013-16), Brookfield, WI 53045

► **Assistant Superintendent, Director of Educational Services** for the School District of Greenfield (2007-13), Greenfield, WI 53220

► **Middle School Principal** for the School District of Greenfield (2000-07), Greenfield, WI 53220

► **Middle and High School Summer School Principal** for the School District of Greenfield (1999 & 2000), Greenfield, WI 53220

► **Glenwood Elementary School Principal** for the School District of Greenfield (1997-2000), Greenfield, WI 53220

► **Willow Glen Elementary School Principal** for the St. Francis School District (1991-97), St. Francis, WI 53235

► **Malcolm X (formerly Fulton) Middle School Assistant Principal Intern, Math/Computer Science teacher** for Milwaukee Public Schools (1989-91), Milwaukee, WI 53212

Elected, appointed and community volunteer positions

- Cedarburg Chamber member and ambassador, 2022-present, Cedarburg, WI.
- Cedarburg Grafton Rotary member (2015-present), Cedarburg, WI.
- Riveredge Nature Center Board member (2016-present), Saukville, WI.
- Riveredge Nature Center Philanthropy Subcommittee (2017-present), Saukville, WI.
- Riveredge Nature Center Ad-Hoc Building Committee (2021- present), Saukville, WI.
- Kettle Moraine YMCA Board member (2019-21), West Bend, WI.
- Cedarburg Public Library Board member (2017-21), Cedarburg, WI.
- CESA I Quadrant Leader (2017-21), Cedarburg, WI.
- Cedarburg City Branding Ad-Hoc Committee (2018-20), Cedarburg WI.

Professional presentations, workshops and courses taught

District based presentations/workshops:

- Wisconsin Association State Business Officials Convention • Wisconsin State Education Convention • Wisconsin Association School District Administrators • RtI • Data Analysis • Special Education • PBIS • Infinite Campus Student Management Software • Report Cards • Instructional Practices • Student Discipline • Scheduling • PDP Evaluator • Aided in teaching graduate level courses for Alverno and St. Mary's College of Minnesota

Appendix B

Sample Contract



872 S. Milwaukee Avenue #221
Libertyville, Illinois 60048

Letter of Understanding

The Board of Education of XXX School District (hereinafter "Board") and *BWP & Associates* (hereinafter "Consultants") agree as follows.

1. Representing *BWP & Associates* as the Consultants, XXX will manage the superintendent search with assistance from XXX.
2. The Consultants will secure information about the District by gathering data from interviews with each member of the Board and any other person or groups the Board so directs. Consultants will share with the Board their findings as to perceived strengths of the District, peoples' perceptions of issues facing the District, and qualifications those interviewed believe are important in a superintendent.
3. The Consultants will draft an advertising fact sheet describing the vacancy; the draft shall be approved by a representative of the Board prior to its publication.
4. The Consultants are directed to advertise the vacancy in regional and national publications as well as the BWP website. The fact sheet will be published on *BWP & Associates*' website with a complimentary Internet link to your school district web site, if desired.
5. The Consultants will work with the Board to establish a timeline for each step of the search process.
6. The Consultants will actively recruit qualified candidates to apply for the position and solicit nominations from knowledgeable people in the education profession.
7. The Consultants will gather data on candidates applying for the position. Those candidates best matching the desired profile will be interviewed by the Consultants to ensure they meet the required criteria. Within ten days or an agreed upon time of the closing of applications, the Consultants will present a list of candidates for Board consideration. References of recommended candidates will be checked by the Consultants.
8. All documents produced and received by the Consultants will remain the property of *BWP & Associates*. The Consultants shall turn over to the Board copies of all documents relating to candidates recommended by *BWP & Associates* at the time the recommendation is made. With respect to this search, the Board will receive a copy of all documents sent out on behalf of the Board.
9. The Consultants will inform the Board and other groups, if appropriate, on items related to search protocols, establishing an interview format, developing interview questions, interviewing candidates, conducting site visits, and other matters related to the search process.

DRAFT



The Consultants will be available during the search process to advise the Board on search related issues.

10. The Consultants will make salary and compensation package recommendations to the Board, if requested.
11. The fee for these consulting services will be \$XXX plus consultant expenses, of approximately \$XXX. Consultant expenses include development of advertisements, creation and maintenance of candidate files, clerical expenses, communications to those in the network and to prospective candidates, postage, telephone/fax/copying/shipping charges and travel. Candidate expenses will be forwarded as incurred to the District's Chief Financial Officer or its designee.

Other anticipated expenses are travel costs for candidates. It is the Board's responsibility to reimburse candidate interview expenses, such as travel and hotel accommodations, as arranged. A form will be offered by BWP & Associates for Board use for reimbursement of candidate expenses, if desired. The Consultant agrees to work with the District's designee to ensure candidates are aware of this expectation.

Additional expenses for the search relate to advertising and recruitment. Advertisements in appropriate regional and national publications and websites are estimated at \$XXX to \$XXX depending on size, number of advertisements, and where placed. These costs are not included in the Consultant fee and will be billed directly from the printer, publisher, website, or through the Consultants.

12. At the Board's request, Consultants can be available for additional services such as accompanying the Board on site visits to candidates' communities, being present with the Board during the candidate interview process, and/or additional press conferences or conducting special team building. Such additional days will be billed at the rate of \$XXX per day plus expenses per consultant.
13. The Consultants' fee will be billed in three equal installments, the first after the signing of the Letter of Understanding, the second after the presentation of the slate of finalist candidates, and the third upon appointment of the new superintendent. Expenses will be forwarded to the Board as they are incurred.
14. Candidate and Consultants' final expenses will be billed within 90 days of completion of the search.
15. The Consultants agree to comply with all relevant federal, state, and local legal requirements, as well as applicable District financial policies and procedures.
16. As the eventual decision to hire the candidate will be the Board's, the Board hereby agrees to save, indemnify and hold harmless the Consultants for any decision the Board makes in the employment process relative to the hiring or failure to hire of any candidate(s) recommended by the Consultants.
17. If the Board is dissatisfied with the Superintendent selected within one year from the date of employment of the Superintendent, and if either party dissolves that relationship by resignation or termination within a one-year period of initial employment, and the Superintendent selected

was one of the slate of candidates recommended by *BWP & Associates*, *BWP* agrees to conduct a new Superintendent Search at no cost to the District except for expenses.

18. Upon execution of this Agreement, the Consultants shall commence services.

This Letter of Understanding constitutes the entire agreement between the parties with respect to its subject matter and supersedes all prior agreements, negotiations, representations, or communications relating the subject matter.

Approved: _____
(Date)

DRAFT

XXX School District Business Office Point of Contact for Invoicing Purposes:

Name: _____

Title: _____

Email Address: _____

XXX School District

BWP & Associates, Ltd.

President, Board of Education/Designee

Managing Director/President



4/26/2023

SUPERINTENDENT SEARCH PROPOSAL

April 26, 2023

Dear Waunakee Community School District Board of Education,

Thank you for the opportunity to share this proposal overview of the services that Hazard, Young, Attea & Associates (HYA) can provide to the Waunakee Community 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: We have conducted over 1,600 searches and are represented by Associates throughout Wisconsin, the Midwest and the nation. HYA has assisted Boards with successful selections in searches with student enrollment ranging from less than 500 to over 640,000 students. In addition, recent HYA Wisconsin searches include: Verona Area School District, School District of Fond Du Lac, Menomonee Falls School District, Cedarberg School District, Whitewater School District, New Richmond School District and the Watertown School District to name a few.

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

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

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

Our proposal, which follows, gives an overview of a prototypical search, but please know that HYA customizes each search to the District's and Board's specific needs and wishes.

Sincerely,



Dr. Mike Richie, HYA Vice President
Email: mikerichie@hyasearch.com / Cell: 715-891-1816

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Hazard, Young, Attea and Associates, (HYA) proposes to assist the Waunakee Community School District in a national search for talented and highly qualified candidates for the position of Superintendent of Schools. This document serves to clearly follow and outline the specific services, deliverables and costs proposed.

1) Executive Summary Overview of firm and rationale for interest in working with the Waunakee Community Schools.

Recruiting, developing, and retaining great leaders is essential to improving your district's student outcomes. HYA takes a collaborative, research-based approach to the superintendent search process. We match the right leader with the goals and priorities of your school system and community.

Search Process: The HYA Search process includes four phases: *Engage, Recruit, Select, and Transition*. The search begins with a planning meeting with the Board to organize the search and create a calendar for completion. The search will engage stakeholders via interviews, focus groups, and surveys to inform the development of the Waunakee Community School District Leadership Profile Report. The Profile Report describes the strengths and challenges of your district as well as descriptions of desirable characteristics for your new superintendent. The profile is presented to the Board and once approved, placed on the district webpage and the HYA website. The profile becomes a recruitment and screening tool for candidates.

Recruitment and Solicitation: Recruitment begins immediately by placing the job posting and position description on the HYA, state and district websites and social media platforms. It is important to note that HYA's website lists ALL superintendent positions regardless of the firm contracted for the search. This brings tremendous traffic to the site from across the nation. Additional national advertising is also available and will be discussed at the planning meeting. Recruitment takes place throughout the search process as Associates make personal contacts with desirable candidates by utilizing the HYA network across all 50 states. HYA also maintains a strong relationship with professional associations supporting minority professionals and candidates of color. A candidate database from previous searches is also used by Associates to recruit recent job candidates.

Selection of Qualified Candidates: Materials to be included in the application are determined by the Board in the planning meeting. Board members will have access to all application materials via a confidential and secure, web based, Board Portal. Associates review all applications and screen and interview ALL candidates to determine the best fit for the Waunakee Community School District based on the information and criteria called for in the Leadership Profile. Once all screening interviews are completed, Associates will create a slate of (usually) 6-10 best fit candidates. The slate will be presented to the Board so they can select 6-8 candidates for first-round interviews. Candidates not chosen for the slate will also be discussed and may be added at the Board's request. The Associates will assist the Waunakee Community School District with arrangements for first and final round interviews, support in creating interview questions, can solicit compensation package information, and can assist with planning and hosting community forums for finalists.

Post-appointment services: The HYA associates can host a transition meeting with the Board and new hire if requested. Additional services post-hiring are also available from HYA.

Communication: Written and verbal communication is provided throughout the search process through the Board Portal. Board members will have access to the Portal 24/7 and will be able to review all of the candidates application materials. Deliverables are described in the proposal. Associates prefer to communicate with one designated board member to prevent open meeting violations. All information can be shared with the full Board following the district communication protocols. Additionally, Associates work closely with the Administrative Assistant for communication and arranging details for community sessions. The work-load for the district staff is minimal.

Challenges to a Successful Search: First and foremost, a trusting relationship between the Board and the HYA Associates is essential for a successful search. Associates are mindful of the professionalism required throughout the search and when representing the Board to the community. Additionally, the Associates are unwavering in their belief that this is the Board's search and will do everything possible to create and conduct a search according to the Board's specifications.

Our current local and national climate has brought challenges for communities, superintendents and Boards which can have an impact on searches. Differing community values and beliefs, and a growing shortage of superintendent candidates can create turmoil and impact searches. Associates are well aware of contemporary educational issues and approach each search in a collaborative and inclusive way to gain an understanding of the specific community being served. No challenge is insurmountable.

Assurance of Required Service: HYA's reputation and references speak for the quality of work provided and satisfaction of past searches. The Associates on this search have strong professional reputations and contacts throughout the Midwest and also at the national level. Experience in recent Midwest searches ensures connections with a vast network of potential applicants for this position.

2) Firm History and Experience - Summary which demonstrates understanding of services needed and experience in providing such services to districts of similar size and scope in Wisconsin.

HYA was established in 1987 and is one of the oldest and largest search firms in the nation, having assisted more than 1,600 School Boards select exceptionally talented leadership. Presently, our firm is represented by 130+ Associates located across the country to conveniently serve clients and are uniquely qualified to bring local and national perspectives, knowledge, experience, and connections to each search. The student enrollment in districts HYA has served, ranges from less than 500 to over 640,000 students and 94% of the superintendents we place stay in their position for more than three years.

HYA averages more than 80 searches per year. This large quantity of searches puts our firm at a competitive advantage as our Associates are in more frequent contact with potential applicants. Many candidates are not actively seeking employment opportunities but are known to Associates and can be recruited when an appropriate position arises.

HYA Associates bring extensive executive search experience and broad educational backgrounds to its practice. Through continuing involvement in school and university work, Associates are aware of current educational issues and have strong relationships with leaders and opinion-makers in administrative leadership and management.

HYA is committed to and proud of the diversity of candidates hired with its assistance, including individuals – both male and female – of varied racial, ethnic, cultural, and religious backgrounds. One of

our Emeritus Associates was the founder of NABSE (National Alliance of Black School Educators) and many current HYA Associates are members.

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 that is a valuable resource to school districts. We understand the specific scope of services as presented and required by the district in the RFP to ensure a successful search process. Please see references provided in question #7 and also in the appendix of this proposal for our experience in providing such services to districts of similar size and scope in Wisconsin.

3) Project Team- Names, titles, contact information, and short project-relevant bio of key individuals who would support this process.

Dr. Mike Richie, HYA Vice President, will serve as the Lead Associate on this search. In the past 5 years, Richie has led over 20 HYA searches and is often requested by school districts to lead their search. Please see attached letters of recommendation in the appendix of this proposal. Richie will be assisted on this search by HYA Associate, Scott Winch and supported by Michelle Fiedler and Daneyelle Martell.



Dr. Mike Richie
HYA Vice President

mikerichie@hyasearch.com

715-891-1816



Scott Winch
HYA Associate

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715-927-2485



Michelle Fiedler

Administrative Assistant

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651-964-9214



Daneyelle Martell

HYA Project Manager

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847-744-5632

Dr. Mike Richie, HYA Vice President: Mike Richie is an innovative leader who excels in thinking outside the box and is always looking for ways to provide the very best in educational leadership. He believes that strategic goals foster the momentum with which an organization’s members can be self-motivated and productive.

After nearly 40 years in education, Dr. Richie has served as a teacher, coach, principal, and superintendent in small, medium, and large school districts in the state of Wisconsin. In his 25 years as a school superintendent, Dr. Richie is known by his staff and colleagues to be a visionary leader with a positive impact on and improving education. He has led his staff in raising test scores, building community and business partnerships, increasing open enrollment numbers, passing eight referendums, and drastically improving communications, public relations and social media efforts. In 2012 Dr. Richie was named Superintendent of the Year by the National Association of School Superintendents (NASS) for his outstanding achievement as a school district superintendent, continuous improvement and commitment to collaboration and mutual support in the profession.

Dr. Richie enjoys coaching and mentoring superintendents that are new to the profession. He serves on the Executive Committee of the National Association of School Superintendents (NASS) and is an adjunct professor at Viterbo University teaching classes in leadership, school law, politics and community relations – preparing students for their principal and superintendent certifications. He has visited China twice to give numerous presentations on American Education.

These experiences make Dr. Richie an ideal Associate for coaching superintendents and assisting school systems in their executive searches.

Scott Winch, HYA Associate: Scott Winch is an educational consultant/leader who has committed to serving over 30 years in public education. He is known by his staff and colleagues to be a collaborative leader and for having a positive impact on improving education. His enthusiasm to support student and school success brings creative solutions to district challenges. Winch has served as a teacher, coach, principal and as a superintendent for the past 20 years in small and medium sized school districts.

Scott is a strong believer in community involvement and was highly active in his district's community, serving as Vice President of the Lions Club and as an active member of the Chamber of Commerce. Scott also believes in building community and business partnerships which has led to numerous donations to upgrade the facilities as well as passing two separate building referendums to expand and improve the facilities.

Scott led his staff in raising test scores, improving school report cards and also believes that a successful district strives to hire and retain quality teachers and administrators and provide them with the guidance, professional development, and support they need to be successful in their profession.

*Associate resumes are included in the appendix of this proposal

4a) Proposed Work Plan - Methods used to work with seven-member Board of Education and other key individuals within the hiring process.

SIGNATURE SEARCH PROCESS

 <p>Engage</p>	<ul style="list-style-type: none"> • Conduct a planning meeting with the Board, which will detail the timeline and steps of the search process • Complete individual Board Member interviews • Conduct focus groups to gather input from constituent groups • Post the on-line research-based community engagement survey with national norms <p><i>All information gathered in the Engage Phase will help create the District Leadership Profile Report which will identify goals, needs, and priorities of the school system to help better match a candidate's skills with the needs of the district and give valuable information to the new leader on day one of employment to set goals and priorities.</i></p>
 <p>Recruit</p>	<ul style="list-style-type: none"> • Draft a position description to use for advertising • Prepare and place advertisements as selected and authorized by the Board • Recruit candidates utilizing local and national networks • Correspond with candidates regarding the search process and timeline • Screen ALL candidates using the Leadership Profile Report and Desired Characteristics • Conduct initial reference checks • Identify best qualified candidates • Prepare selected slate of candidates for Board consideration (number of candidates to be determined by the Board)
 <p>Select</p>	<ul style="list-style-type: none"> • Present slate of candidates to the Board • Conduct informal background checks with social media searches and reference checks • Co-coordinate interviews for the Board with selected semi-finalists • Co-coordinate the "Day in the District" for finalists • Provide QR codes and feedback forms for the community to provide input for finalists • Facilitate Board discussion to narrow the candidate pool after each round of interviews (<i>The Board's decision to hire/not hire a candidate is at the sole discretion of the Board</i>) • Coordinate and provide third-party, independent investigative background check(s) of candidates as selected by the Board
 <p>Transition</p>	<ul style="list-style-type: none"> • Communicate with all unsuccessful candidates at the close of the search • Hold a debriefing meeting with the new Superintendent and Board regarding information learned throughout the search process • Offer other transition services to be considered by the Board and if desired, paid for by the Board <ul style="list-style-type: none"> ○ These services include Executive Coaching, Board Governance Training, Superintendent Evaluation and Strategic Planning

Community Engagement:

HYA will weigh heavily on community engagement to understand the organization. Individual interviews and focus groups are scheduled in order to learn about the strengths and challenges of the district as well as the desired characteristics of the new superintendent. Our key stakeholder groups will include but are not limited to: high school students, parents, certified staff, support staff, administrators, School Board Members, business partners, other businesses, civic groups, district residents, booster clubs, PTO’s, and any other individual, groups or organizations that the Waunakee Community School District Board identifies and wishes to include. These sessions will be both in person and by Zoom, which will allow for maximum participation. Concurrently, a research based, on-line survey solicits input from six disaggregate groups as determined by the Board. Data from the interviews and the survey inform the creation of the District Leadership Profile Report, which becomes a public document once accepted by the Board. This report includes essential information the Board will use in the selection process and the new leader can use day one of employment.

Board Portal:

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 search Associates have access to all information associated with the search in an organized and confidential, password protected Board Portal. Items are organized by the search phase under the following six tabs. Example items included are listed below:

Home	Propose	Engage
<ul style="list-style-type: none"> · Search Team Members · Board Updates · Zoom Links · Board Planning Summary · Summary Notes · Search Timeline 	<ul style="list-style-type: none"> · RFP · Proposal · Presentation · Signed Letter of Agreement 	<ul style="list-style-type: none"> · Summary Survey · Open Ended Survey Questions · District Leadership Profile Report · Profile Report Presentation · Focus Group Schedule
Recruit	Select	Transition Services Available
<ul style="list-style-type: none"> · Job Postings · All Candidate Application Materials and Resume / CV · Slate Presentation 	<ul style="list-style-type: none"> · Interview Schedule · Day in the District Schedule · Tier 1 -2 -3 Document · Interview Questions · Google Forms (Day in the District Feedback) · Feedback Responses Document · Candidate Presentations · Delphi Technique · Screening Tool · Interview Rubrics 	<ul style="list-style-type: none"> · Comprehensive First Year Support · Executive Coaching · Board Governance · Board Goal Setting · Superintendent Evaluation · Strategic Planning · Community Engagement

Advertising:

During our Board planning meeting, we will discuss where the Board would like to advertise. Keep in mind all HYA searches are advertised on the HYA Active Searches webpage and social media accounts - Facebook, LinkedIn, Instagram 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.

We will always recommend advertising within your state. Most state associations provide advertising opportunities for administrative positions. In Wisconsin, we advertise in the WI School Leadership Center (WSLC Career Center). In addition, you may choose to advertise in bordering state associations as well. For a full national search you may want to consider advertising in the following: AASA (American Association of School Administrators), Ed Week, ASCD (Association for Supervision and Curriculum Development), ALAS (Association of Latino Administrators and Superintendents) and NABSE (National Alliance of Black School Educators).



Scan QR code above for all superintendent job openings.

Use of District Staff:

Staff involvement would not be expected to be extensive beyond providing contact information and scheduling interviews and focus groups for identified constituents, identifying facilities to be used during the process, placing the link on the district website for surveying stakeholders, inviting public participation, scheduling and notifying stakeholder groups of the online survey, and acting as a liaison during the search process. The search team communicates regularly with the district's Administrative Assistant in the superintendent's office. If the district has a communications person, they are also an asset during the search process.

Confidentiality:

HYA is committed to ensuring the confidentiality that is crucial for building and maintaining trust, protecting privacy, and ensuring the integrity of sensitive information for the duration of the search process. Applicant information remains confidential until five (5) or fewer candidates are named as finalists. At that time, the finalist names become public and HYA Associates will assist the Board with final interviews. Information on all candidates is available to the Board throughout the search process through the password protected Board Portal.

Guarantee of Performance:**Fixed Price**

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

Price Match

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

Client-Satisfaction

If the superintendent departs from the position during the first year under any circumstances professional or personal, or within two (2) years, if the 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 with the exception of travel, advertising and due diligence expenses. A full 94% of all superintendents we have placed in the last ten years have completed at least the full term of their first contract (usually three years).

Insurance:

Arbitration & Litigation

Hazard, Young, Attea & Associates is not currently, nor ever has been, involved in litigation or arbitration with any of its clients in our 30+ years in business. There have been a few instances in which the search ended prior to a new superintendent being hired. In these situations, the search process was completed and a finalist was chosen, but prior to the signing of the contract, either the finalist chose not to take the position, or the Board chose not to hire them. In a couple of cases, the Board chose to end the search for non-search related reasons.

Subcontracting:

HYA does not use subcontractors aside from an independent, third-party investigative firm to conduct due diligence background checks. The company, Baker-Eubanks, LLC, is a minority owned firm based in Durham, North Carolina.

Bankruptcy:

Hazard, Young, Attea & Associates has never filed for reorganization or bankruptcy.

4b) Proposed Timeline

TENTATIVE SCHEDULE FOR WAUNAKEE COMMUNITY SCHOOL DISTRICT SUPERINTENDENT SEARCH	
June, 2023	The HYA Team will meet with the Board to plan the search, determine the process, and finalize timeline etc.
August, 2023	Individual interviews with Board Members (phone)
September, 2023	Stakeholder interviews/focus groups/forums
September 18 through October 31, 2023	Post Position on HYA website and other sources Accepting applications and recruiting Network with other HYA Associates Advertising and marketing
Ongoing as HYA receives applications	HYA screening interviews/vetting
Mid-September, 2023	Open HYA digital survey to all stakeholders
End of September, 2023	Close HYA digital survey
Early October, 2023	Presentation of District Leadership Profile Report
Early November, 2023	Presentation of slate to Board and interview workshop
Mid November, 2023	Board first round interviews / Board meets to identify semi-finalists
End of November, 2023	Finalists Day in the District
Early December, 2023	Board conducts final interview(s) and HYA third party background check
By the end of December, 2023	Superintendent's hiring approved and announced
July 1, 2024	Superintendent contract formally begins

5) Estimate of Cost - Break down of anticipated costs by category, such as fees, travel, supplies, etc. Maximum price that will not be exceeded to complete a search based on the firm's offered services, as well as the payment terms.

Waukegan Community School District Superintendent Search Price Proposal - Maximum Total Search Cost	
HYA Search Fee:	\$18,500 (this fee includes the HYA Survey)
Travel: Utilizing Zoom for portions of the search will reduce travel costs.	\$1,000 to \$2,500 (not to exceed)
Optional Services Available if Selected by Board	
Additional Days: Our base fee includes up to four individual Associate consulting days. Most searches are completed utilizing four days. However, in some cases the Board requests more days in the District (examples: additional focus groups, additional interviews, additional meetings, attend interviews, coaching, and/or mentoring).	\$2,500 per additional day. This fee includes all costs for Associates travel.
Advertising: The Board determines what type of advertising they want. HYA has designed extended advertising packages to maximize exposure for the vacancy. The Board will choose the package that best suits their needs. Advertising on the HYA website, National Association of School Superintendents (NASS) website and social media pages are included in the base fee.	State of Wisconsin Advertising (\$359) National Advertising (\$2,150 to \$4,000)
Comprehensive Third Party Background Check: Background checks/Executive Due Diligence Services, are typically conducted on the lone finalist, as selected by the Board. The comprehensive cost from a third-party professional firm (per candidate) includes the following: <i>Personal Profile Summary</i> <i>Social Security Trace</i> <i>County Criminal Record History</i> <i>Federal Criminal Record History</i> <i>County Civil Record History</i> <i>Department of Motor Vehicles License Information</i> <i>Education (Degree) Verification</i> <i>Credit Report</i> <i>Investigation of all Aliases Identified within Past Seven Years</i> <i>Investigation of all Jurisdictions of Residence, Education, and Employment within Past Seven Years</i> <i>University and Academic Program Accreditation</i> <i>National Criminal Record History</i> <i>National Sex Offender Search</i> <i>News Media Review</i> <i>Social Media Review</i>	\$1,100 to \$1,950
Fee is due in two installments:	
<ul style="list-style-type: none"> ● 50% will be invoiced upon execution of the contract/agreement ● 50% will be invoiced upon presentation of the slate 	

6) Sample contract - Closest possible approximation of a contract with your firm. If not outlined within the contract, include as supplement: methods of assessing and ensuring client satisfaction (during/post-process and in the event of an unsuccessful search), any guarantee periods, and the confidentiality process afforded to the client and participating candidates.

LETTER OF AGREEMENT

HYA Signature Search

Purpose

The purpose of this Letter of Agreement (the "Agreement") is to document the working arrangement between Hazard, Young, Attea & Associates ("HYA"), and Waunakee Community School District (the "District") and its Board of Education (the "Board") to support the Board in its effort to recruit and employ talented leadership. All schedules hereto are an integral part of this agreement and are deemed incorporated by reference herein.

Section I: HYA Responsibilities

HYA shall provide the following services and deliverables:

Engage Phase:

- A. Conduct a planning meeting with the Board and provide a summary of said meeting which will detail the timeline and steps of the search process and decisions made by the Board;
- B. Coordinate the survey of community constituents electronically and provide a report of findings. The *HYA Community and Leadership Profile Survey* is a research-based instrument that is specifically designed for the search process and has a specific analysis, scoring logic and reporting framework. The *HYA State of the District Survey* offers more questions and provides an in-depth picture of the quality of programming, priorities for the Superintendent in the next 3-5 years, and Equity. This survey also collects data on the race of the respondent. Customization of up to 10 forced choice questions and 4 open-ended questions is available for both survey options as selected and paid for by the Board. The surveys are provided in English and Spanish. Additional world languages are available. Administering the survey in paper format is not supported; paper administration can be quoted but note it will change the timeline for delivery of the leadership profile report. Should the Board elect to have open-ended questions, the comments will be provided verbatim and under separate cover; the Board should consult their attorneys before disseminating open-ended comments as they may contain student or personnel information. HYA assumes no responsibility for the release of open-ended comments. Fees for Survey Services are attached to this Letter of Agreement.
- C. Provide up to four individual consultant days for interviews, focus groups and/or town hall meetings to gather in-person input from constituent groups as decided by the Board, e.g. if two consultants are present for a full day, that counts as two days.
- D. Prepare and present a *Leadership Profile Report* to the Board, and propose *Desired Characteristics* based on the data from the survey, interviews with district and community representatives and other material made available to the Associates;

Recruit Phase:

- E. Coordinate and place advertisements as selected and paid for by the Board;
- F. Recruit and contact candidates utilizing state and national networks;
- G. Correspond with candidates regarding the search process, timeline, *Leadership Profile* and desired characteristics;
- H. Interview candidates;
- I. Conduct reference checks;
- J. Identify best qualified candidates;
- K. Prepare application materials of selected slate of candidates for the Board consideration;

Select Phase:

- L. Present a slate of candidates, the number of candidates to be determined by the Board with a recommendation from HYA;
- M. Conduct the Interview Workshop and provide materials and protocol to ensure informative effective Board interviews;
- N. Schedule interviews for the Board with selected semi-finalists and finalists;
- O. Facilitate Board discussion to narrow candidate pool after each round of interviews;
- P. Coordinate and provide investigative background check(s) of candidates to the Board President as selected and paid for by the Board;

Transition Phase:

- Q. Communicate with all unsuccessful candidates at the close of the search and the appointment of the new Superintendent;
- R. Hold a transition meeting with the new Superintendent (after employed) regarding information learned throughout the search and next steps in the transition process;
- S. Offer other transitional services to be considered by the Board and if desired, paid for by the Board.

Section II: Board and District Responsibilities

To effectuate the search and selection of a successor superintendent, the Board has the following responsibilities:

- A. The Board will approve the search process at the planning meeting;
- B. The Board will select survey enhancements, advertising and executive due diligence services to be paid for by the Board;
- C. The Board accepts full responsibility for using the information it receives from the executive due diligence services (background check) in a legally acceptable fashion and to comply with all federal, state and local laws regarding the use of background checks and the consequences of use.
- D. The Board will conduct interviews (and site visits, if desired) of finalists shortly after a slate is presented. The HYA Associates will not be present at the Board interviews or site visit but will assist the Board in the scheduling of the interviews and preparation. The HYA Associates will be available by phone during the scheduled interviews.
- E. The Board will have its attorney approve the job posting, the Board's process for interviewing candidates, and the requirements for transparency of finalist(s) to comply with open meeting laws and public employment laws in their state.
- F. The Board will decide whether to reimburse candidates for expenses and will reimburse candidates directly.
- G. The Board will write and execute the employment contract with the selected superintendent, with the assistance of its attorney. The HYA Associates will support the Board and its attorney, if requested.
- H. The Board will communicate with local media regarding the search process and appointment of a superintendent with its community relations/public relations designee. The HYA Associates will support the Board and its designee, if requested.

Section III: Guarantees

- A. Throughout the search process the HYA Associates will be available to counsel with the Board about the search. The HYA Associates will assist the Board until the Board determines it has found the appropriate candidate for the position.
- B. 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 five (5) years of employment unless the Board provides written authorization to HYA that they may do so.
- C. 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 by vote is still in place and departure is due to Board 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.

- D. Should the Board choose to end the search before a superintendent is selected, the Board is responsible for the search fee, advertisement, background checks and all expenses incurred prior to their decision based on the fee and payment schedule outlined herein.

Section IV: Fees and Payment Schedule

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

- A. Consulting Fee for the search in the amount of \$18,500 (fee includes HYA survey).
This fee is due in two installments:
 - 50% will be invoiced upon contract signing and completion of the Planning Meeting
 - 50% will be invoiced after the slate is presented
- B. Additional on-site consulting days billed at \$2,500/day as selected and paid for by the Board.
- C. Advertisement pursuant to the Advertising Services Schedule attached to this agreement as selected and paid for by the Board.
- D. Background checks pursuant to the Executive Due Diligence Services Schedule attached to this agreement as selected and paid for by the Board.
- E. Survey services, customization and world languages, pursuant to the Survey Services Schedule attached to this agreement as selected and paid for by the Board.
- F. Materials, Printing and Postage; If the Board requests hard copies of the materials, the district will be invoiced to cover the costs of printing, binding and shipping materials.
- G. 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.

Section V: Reimbursement Costs

- A. Travel expenses for consultants to meet with the Board and/or conduct interviews will be borne by the Board. Estimated travel expenses for consultants will range from \$1,000 to \$2,500 (not to exceed). Expenses are billed after the presentation of the *Leadership Profile Report*, after the slate is presented, and at conclusion of the search. Mileage reimbursement is based on current IRS guidelines.
- B. If the Board approves and pays travel expenses of candidates, this will be submitted by the candidate directly to the District.

Section VI: Additional Services

- A. If and when selected, the workshop(s) costs will be added pursuant to the Transition Services Schedule of this agreement. (The Interview Workshop is included in the consulting fee for the search.)
- B. If the Board wishes to secure additional services beyond those described in this agreement or to design customized workshops and services, these services can be discussed and defined with the consultants and added to the contract as an addendum.

Section VII: Business Relationship

- A. The District and HYA agree that HYA does not have the status of employee, shall not be entitled to any employee fringe benefits, and shall function as an independent contractor.
- B. The District agrees that any and all Intellectual Property and technology designed, made or conceived by HYA (solely or jointly with others) arising from HYA's work for the District, is the sole property of HYA, without royalty or other consideration to the District.
- C. All information, notes, interview sheets, lists, and other documents developed by HYA consultants shall remain the property of HYA.
- D. The District and the Board understands that it is unlawful for it to either disclose to any person outside of the District's employment or make any unauthorized use of HYA trade secrets or confidential information unless it can be shown that such information has become public knowledge through no act of the District or Board.
- E. The Board's decision to hire or not hire a particular candidate is at the sole discretion of the Board; and the Board takes responsibility for that decision.

Section VIII: Term and Termination

This Agreement shall become effective on the date the Agreement is signed by the District and will continue in effect until the search is completed and mutually terminated by both parties.

Hazard, Young, Attea & Associates:

Waunakee Community School District:

Signature

Signature

Date:

Date:

7) References - Names, titles, and contact information of officials at three school districts (ideally of similar size) that have used your firm's services to secure a superintendent in the last three years.

District Name	Reference Name	Phone	Email
Littleton, CO (2022) District Enrollment 15,000	Robert Reichardt Board President	303-803-4412	robertreichardtboe@lps.k12.co.us
Fond du Lac, WI (2021) District Enrollment 6,830	Dr. Susan Jones Board President	920-979-1364	joness@sb.fonddulac.k12.wi.us
Verona, WI (2021) District Enrollment 5,932	Meredith Christensen Board President	847-724-8465	christem@verona.k12.wi.us
South Sioux City, NE (2022) District Enrollment 4,000	Chris Krueger Board Vice President	712-223-0698	chris.krueger@ssccards.org

**Please see Appendix for complete list of all HYA searches as well as searches completed by Dr. Richie specifically. Feel free to contact any references from searches led by Dr. Richie.*

8) Acknowledgement of potential second round of assessment - Acknowledge firm's willingness to participate in an onsite with the Board of Education, if requested.

The Board will have access to all candidate materials via a confidential Board Portal. Candidates not chosen for the slate will also be discussed and may be added at the Board's request. HYA will assist the Board until they have found the appropriate candidate for the position. If there is a need to slate additional candidates these search activities will be provided at no extra cost. HYA Associates assist the Board with the entire search process including all rounds of interviews and will be present for interviews if requested by the Board. Associates will assist the Board in developing a list of interview questions specific to the Waunakee Community School District. They will also provide a screening tool to help narrow the applicant pool throughout all interview rounds and ultimately select the final candidate.

9) Additional information - Should you feel that additional information would be helpful to best evaluate your firm's offerings, please add such information under this heading.

Creation of a Diverse Candidate Pool

HYA Associates always work to provide a slate of candidates that is representative of the student demographic in the school district. Associates will recruit candidates that specifically match attributes and desired characteristics identified in the District Leadership Profile Report.

Proven History and Local Experience

The proposed search team has a reputation of success not only in Wisconsin, but also across the Midwest. The HYA team assembled to lead the Waunakee superintendent search has a combined 70 years of education experience in Wisconsin. Dr. Mike Richie has led over 20 searches for HYA in the past 5 years and all superintendents placed by him continue to serve the districts in which they were hired. According to market research, HYA completes the highest number of searches per year and has the lowest superintendent turnover rates of any of our competitors. Our recruiting process is structured to

take the time needed to find the right candidate. If for some reason the candidate pool does not yield the right match for your district, we will continue to recruit and provide another slate for the Board's consideration. Approximately 75% of candidates selected for superintendencies were specifically recruited for that district and may not have considered the position without our contact and communication.

APPENDIX

The APPENDIX pages of this proposal include the following documents:

1. Resume - Dr. Mike Richie
2. Resume - Scott Winch
3. Reference Letter - Lincoln Public Schools, NE (Search)
4. Reference Letter - Iowa School Board Association (Search)
5. Reference Letter - Littleton Public Schools, CO (Search)
6. Reference Letter - Whitewater Unified School District, WI (Search)
7. Reference Letter - Fond du Lac School District, WI (Search)Wa
8. HYA Customer Satisfaction Article
9. Organization Flow Chart
10. Select HYA Superintendent Search History (2017-2022)
11. Richie Led Search History
12. Interview Questions
13. Certificate of Liability Insurance



MIKE RICHIE, ED.D.

HAZARD, YOUNG, ATTEA & ASSOCIATES
VICE PRESIDENT

 mikerichie@hyasearch.com

 @mikerichie130

 <https://hyasearch.com/>

 715-891-1816

EDUCATION

- 2006 – Ed.D. Edgewood College, Madison, WI
- 2000 – Specialist Certification in Educational Administration, UW Superior, Superior, WI
- 1990 – M.S. Educational Administration, UW Superior, Superior, WI
- 1986 – Certification in Elementary Education, UW River Falls, River Falls, WI
- 1984 – B.S. in Physical Education, UW La Crosse, La Crosse, WI

AWARDS

- 2018
WASDA Superintendent 20 Year Service Award
- 2012
National Association of School Superintendents, National Superintendent of the Year
- 2012
The Collaborative Leadership Network, Collaborator of the Year, Rivers as Bridges
- 2010
YMCA Wisconsin Key Leader Award
- 2010
National Association of School Superintendents Featured Member
- 1994
WI Reading Association Outstanding Administrator Award

PROFESSIONAL EXPERIENCE

2018–Present

Educational Consultant Hazard, Young, Attea & Associates

2015–Present

Adjunct Professor Viterbo University, La Crosse, WI

2013–2017 & 2022–Present

Executive Committee–National Association of School Superintendents

K–12 PROFESSIONAL EXPERIENCE

2019 – 2023

Interim Superintendent Tomorrow River School District | Amherst, WI

2004 –2018 (Retired)

Superintendent Northland Pines School District | Eagle River, WI

2003 –2004

Superintendent Howard–Suamico School District | Green Bay, WI

2001 –2003

Superintendent New London School District | New London, WI

1995 –2001

Superintendent/Principal Hurley School District | Hurley, WI

1992 –1995

Elementary Principal Bonduel School District | Bonduel, WI

1990–1992

Elementary Principal New Richmond School District | New Richmond, WI

1984–1990

Teacher Rice Lake School District | Rice Lake, WI

RELATED LEADERSHIP ACTIVITIES

- Presenter – China/American PK-12 Education: Shanghai, Beijing, Chengdu, Yangzhou, Langfang, Wuhan, Wuxi China 2015 & 2017
- Presenter – WASB State Convention: Pay for Performance Pay Scale
- Presenter – WASB State Convention: Using a 360 Leadership Performance Review Tool
- Presenter – WASB State Convention: Strategies for Passing Referendums
- National Association of School Superintendents – Member 2011–Present
- WASDA – Administrative Salaries and Fringe Benefit Committee 2011–2017
- Published Monthly Superintendent’s Message for the National Association of School Superintendents 2012
- Wisconsin Association of School District’s Administrators Member 1998–Present
- Association of School Administrators – Member 1998–Present
- District Administrators Leadership Institute Invitee and Member 2014–2019
- National Association of School Superintendents Hall of Fame Member 2022

Scott Winch

Objective

To serve a dynamic community in an administrative position that will positively influence school culture and individual students for the betterment of society. Success will come through personal dedication, energy, initiative, collaboration and enthusiasm linked with programming based on practical experience, futuristic thinking and educational theory.

Professional Experience

Interim Superintendent, Owen Withee School District, 2022 - Present.

Superintendent, School District of Stratford, 2004-2022.

Superintendent, School District of Niagara, 2003-2004.

K-12 Principal, School District of Niagara, 2002-2003.

Dean of Students, Government/Citizenship and World History Instructor, Greenwood High School, (Grades 6-12), 2001-2002 school year.

Advanced Placement Government, Senior Social Studies, Government/Citizenship, World History and Current Issues Instructor, Greenwood High School, 1997-2001.

American Government, United States History since 1865, Social Problems, World Geography and Economics Instructor, Mellen High School, (Grades 6-12), 1996-1997.

Education

2001-2002 Winona State University, Winona, MN
Master of Science in Educational Leadership.

1992-1995 University of Wisconsin-Stevens Point, Stevens Point, WI
1987-1989 Bachelor of Science Degree in Secondary Broadfield Social Studies with a minor in Political Science and emphasis's in History and Sociology.

Leadership Experience

Wisconsin Interscholastic Athletic Association, Board of Control, 2015-2021.
President, 2017-18 School Year.

Wisconsin Interscholastic Athletic Association, Advisory Council, 2010-2015.
President 2011-12 School Year.

Wisconsin Interscholastic Athletic Association, Sportsmanship Committee, 2004-2010.

Great Northern Conference, Commissioner, 2007-Present.

President, Marawood Conference, 2007-08, 2010-11, 2014-15.

Member, Marathon County Library Board, 2007-present. President, 2012-2018.

Member, Bay DeNoc Community College Advisory Council, 2003-2004.

Crew Chief, WIAA Football Officiating Crew, 1995-2015.

**Community
Activities**

Member, Stratford Lions Club, 2004-present.

Member, Marshfield Elks Club, 2004-present.

Member, Stratford Area Chamber Commerce, 2004-2022.

Member, Sons of the American Legion, 1985-1992, 2015-present.

Member, Niagara Athletic Booster Club, 2002-2004.

Member, Niagara Area Lions Club, 2002-2004.

Member, Greenwood Athletic Booster Club, 1997-2002

**Interests and
Activities**

Spending time up north at our cottage, fishing, golfing, watching and attending high school and college activities.

**Conferences and
Professional
Development**

2019 NFHS National Convention, Indianapolis, IN: Attendee and Small Group Moderator.

2018 NFHS National Convention, Chicago, IL: Attendee.

2017 NFHS National Convention, Providence, RI: Attendee and Moderator.

2016 NFHS National Convention, Reno, NV: Attendee

QE Conference 2015

Solution Tree/Professional Learning Communities 2012,2013,2014

SLATE Conference 2011

State, Regional and Local Conferences and Meetings 2002-present.

References

Available upon request.

March 8, 2022

SUBJECT: HAZARD YOUNG ATTEA & ASSOCIATES

To whom it may concern:

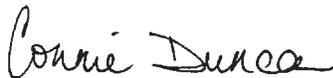
I am pleased to recommend Hazard Young Attea & Associates to do your next Superintendent Search. As President of the Lincoln Board of Education, I can honestly say that our search produced a very strong Superintendent for our district.

The process that HYA uses to find the best candidates was very organized. The search team conducted in-person interviews with many stakeholder groups in our district, producing a superintendent profile that we were very happy with.

The slate of candidates and easy access to all applications helped our board feel like they were a part of the process. The members of the search team were always available for calls and were very timely with responding to emails. The communication between the board and HYA was excellent.

Once again, I would highly recommend HYA to do your next Superintendent search.

Sincerely,



Connie Duncan
Lincoln Public Schools Board of Education
District 2



Iowa Association of School Boards
6000 Grand Ave., Ste. A
Des Moines, IA 50312
direct (515) 288-1991
fax (515) 243-4992

March 2, 2023

To Whom It May Concern:

The Board of Directors for the Iowa Association of School Boards recently completed a search for an Executive Director with the assistance of HYA. We worked with Dr. Mike Richie and Todd Strom and we are very pleased with their service.

Our work with Mike and Todd spanned three months. For the duration of the search they were very responsive and professional. They also helped us find ways to make our search more economical, such as limiting our advertising budget. We chose to hold the initial interview round through Zoom and they were diligent in helping that process run smoothly.

One of the most helpful tools in the search was the HYA Board Portal. The Portal was always up-to-date and allowed our board members to have all the information they needed to learn about the candidates. In addition to using the portal, Mike and Todd were always available to answer emails and phone calls. We appreciate them making us feel important and like we were their top priority client.

As we chose our final candidates and then our new Executive Director, Mike was ever ready to help guide the process. We found his insights to be thoughtful and productive. Mike's network reaches far and he had many ways to learn background information about our final candidates.

Mike, Todd, and the HYA team helped IASB find great candidates. We know their professional service found the best person to serve as our next Executive Director. Thank you, HYA!

Sincerely,

Elizabeth Brennan, President

Jim Green, Past President

IASB Board of Directors



EDUCATION SERVICES CENTER

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February 2023

To Whom It May Concern:

I am pleased and honored to recommend Mike Richie and Hazard, Young, Attea, & Associates for your Superintendent search. Our Board of Education selected HYA after interviewing a number of search firms and we were not disappointed. The role of hiring a new superintendent can be daunting, yet sacred, and Mike was with us every step of the way.

HYA's process from beginning to end was thorough, thoughtful, and transparent. Beginning with their RFP, it was clear that Mike would lead a strong search. His attention to detail was unmatched. We were provided with all of the information we needed in order to determine what our community was looking for in a superintendent and to then put that information into action to recruit the most highly qualified candidates.

Mike was available and responsive throughout all steps of the process. Our search was truly nationwide and Mike and his team came through and provided us with a diverse pool of candidates that each fit the needs of our unique community. We are now at the end of our search and are beyond pleased with the final result. Mike continues to support us as we begin the transition phase.

I have no reservations in wholeheartedly recommending Mike Richie and HYA.

If you have any additional questions, I would be happy to visit with you. I can be reached at achristensenboe@lps.k12.co.us or 720-341-2197.

Best of luck as you begin your search.

Angela Christensen
Board of Education
Littleton Public Schools



"Every Student, Every Day, in a Unified Way."

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November 16, 2020

To Whom It May Concern,

The Whitewater Unified School District chose Hazard, Young, Attea and Associates to assist us in our search for a new District Administrator. We chose Hazard, Young, Attea and Associates because of their professional presentation to our school board. It was evident in our interview that Dr. Pat Neudecker and Dr. Mike Ritchie were informed about the needs of our District as well as the candidates who were available.

We began the process as a normal search but quickly had to switch to a virtual process. Virtual interviews and community forums were organized by Dr. Neudecker and Dr. Ritchie and left the board with the feeling that we conducted a thorough search under trying circumstances.

From the initial candidate screenings to the final background checks, the search was conducted efficiently and transparently. Without reservation I recommend Hazard, Young, Attea and Associates to assist you in your superintendent search.

Sincerely,

Casey Judd
President, Whitewater Unified School District School Board

August 26, 2021

To Whom It May Concern

It is my great pleasure to recommend the services of Hazard, Young, Attea and Associates (HYA) in the search for a school superintendent. Their search process is coordinated, follows an appropriate timeline, and includes input from all of the stakeholders in the district. The Fond du Lac School District chose HYA after interviewing five firms.

The first step was a planning meeting with the Board to determine the steps of the search process and the timeline of the search. HYA used interviews and focus groups to ascertain the qualities the community wished to see in a superintendent candidate. The results of this process was a Survey Summary and Leadership Profile Reports, which I found to be extremely helpful.

Recruitment and an initial slate of candidates was presented to the Board in a clear manner. The final slate of candidates gave the Board a choice of some very qualified persons.

It was a relief to entrust the process with HYA. Communication with HYA was flawless. Drs. Mike Richie and Pat Neudecker emphasized their experience and expertise in the search process. I was the President of the Board at that time, I found myself confident in the search process and eventual selection of a candidate.

If you wish to contact me for further information, I can be reached by email at jones@sb.fonddulac.k12.wi.us, or by phone at 920-979-1364.

Sincerely,

Dr. Susan M. Jones, RN

Fond du Lac School Board



SOUTH SIOUX CITY COMMUNITY SCHOOLS

Dr. Rony Ortega was selected to lead as the next Superintendent of South Sioux City Community Schools starting July 1, 2023. The community school district educates about 3,700 students in the suburbs of Dakota County, Nebraska. Dr. Ortega will finish out the school year at Bryan High School in Omaha, Nebraska where he has been serving as principal for the past four years.

Ortega has gained a wealth of knowledge and experience in his 20 years serving in education. He has held a variety of positions in diverse populations, working in both affluent and economically disadvantaged communities, communities where the predominant language is English, and those where it is Spanish. “I have developed the skills to bring diverse people together to coalesce around improving schools and student outcomes,” stated Dr. Ortega. He considers himself a versatile leader who can adapt his leadership style to meet the needs of the people, situations, and circumstances. In a public interview, Ortega indicated to the school board that the strengths he brings to the district will complement the challenges faced by the South Sioux City Community Schools. He looks forward to establishing, nurturing, and leveraging relationships to improve outcomes for all students.

“From the beginning, I felt comfortable and confident in the search process conducted by Mike Richie with HYA,” commented Dr. Ortega. HYA wishes to extend thanks to the South Sioux City Community Schools for putting their trust in the HYA firm. “The South Sioux City School District was amazing to work with throughout the entire search process. While spending a day in the district and conducting 16 focus groups throughout the search process, the hospitality and professionalism received from the district was phenomenal,” stated HYA lead associate Mike Richie.

“We really had a talented slate of finalists, each candidate brought high-caliber educational knowledge and community relations,” school board Vice President, Chris Krueger, declared.

HYA’s Mike Richie stated, “At the end of the day, the Board had four finalists that matched the desired fit the district was looking for based on the Leadership Profile Report.”

“The superintendency is the capstone to my American Dream, and I look forward to the opportunity to ensure the next generation can achieve their American Dream, too,” declared the new superintendent. HYA looks forward to following the leadership of the school district as they help students turn dreams into reality.



Dr. Rony Ortega

ORGANIZATION FLOW CHART



SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

2021-2022

0 – 5,000 students	0 – 5,000 students (cont')	5,001 – 25,000 students	25,000+ students
<p>Bedford Central SD (NY) 4,100 students, K-12 John Boucher 914.584.3321 Ed Reader 914.334.1448</p> <p>Cedarburg SD (WI) 3,100 students, PK-12 Rick Leach 262.894.4284</p> <p>Chester Community Charter School (PA) 4,500 students, K-8 Jake Der Hagopian jderhagopian@csmillc.com</p> <p>Dobbs Ferry SD (NY) 1,500 students, K-12</p> <p>Edgemont SD (NY) 2,029 students, K-12 Monica Sganga 914.450.0135</p> <p>Faribault PSD (MN) 3,500 students, K-12 Chad Wolff 612.716.1757 Jerry Robicheau 507.330.4524</p> <p>Gibraltar Area SD (WI) 517 students, PK-12 Stephen Seyfer 920.421.5101 sseyfer@gibraltar.k12.wi.us</p> <p>Holmdel PS (NJ) 3,000 students, PK-12 Vicky Flynn 201-486-2718 vflynn@holmdelschools.org</p> <p>Johnson Creek SD (WI) 570 students, PK-12 Richard Wrench 920.988.4878</p> <p>Los Gatos-Saratoga Joint Union HSD (CA) 3,500 students, grades 9-12 Katherine Tseng ktseng@gsuhdsd.org</p> <p>Middlesex County Vocational and Technical Schools (NJ) 2,100 students, grades 8-12 Keith Jones kjdevonsrenaissance@gmail.com Michael Affrunti maffrunti@connellfoley.com</p>	<p>SD of Monroe (WI) 2,230 students, PK-12 Ron Olson 608.293.0320</p> <p>SD of New Richmond (WI) 3,450 students, PK-12 Holly Butler 715.243.7443</p> <p>Niles Township HSD 219 (IL) 4,650 students, grades 9-12 Naema Abraham 773.953.6870 naebr@d219.org</p> <p>Pioneer SD (WA) 660 students, PK-8 Dr. Susan Day 360.878.3952</p> <p>Pittsville SD (WI) 550 students, PK-12 Mandy Hoogesteger 715.213.9277</p> <p>Riverview SD (WA) 3,100 students, PK-12 Lori Oviatt 425.785.7971</p> <p>Rosholt SD (WI) 500 students, PK-12 Karla Schoofs 715.572.1591</p> <p>Scarsdale PS (NY) 4,650 students, K-12</p> <p>Verona PS (NJ) 2,300 students, PK-12 Lisa Freschi 862-202-5134 lfreschi@veronaschools.org</p> <p>Voorhees PS (NJ) 3,000 students, PK-8 Rachel VanAken 856-631-3454 vanakenr@voorhees.k12.nj.us</p>	<p>Ames Community SD (IA) 5,001 students, PK-12 Sabrina Shields-Cook 515.451.8306</p> <p>Highline PS (WA) 17,500 students, K-12 Angelica Alvarez angelica.alvarez@highlineschools.org</p> <p>Hillsborough Township PS (NJ) 7,300 students, PK-12 Paul Marini pmarini@htps.us</p> <p>Newburgh Enlarged City SD (NY) 12,000 students, PK-12 Carol Mineo cmineo@necsd.net</p> <p>SD of Janesville (WI) 9,575 students, PK-12 Greg Ardrey 608.757.1677 gardrey@janesville.k12.wi.us</p> <p>North Penn SD (PA) 12,600 students, K-12 Tina Stoll 215.783.1817 stollti@npenn.org</p> <p>Oak Park Elementary SD 97 (IL) 5,700 students, PK-8 Jung Kim 847.331.7797 jkim@op97.org</p> <p>Roaring Fork SD (CO) 5,600 students, PK-12 Kathryn Kuhlenberg 970.379.4725 kkuhlenberg@rfschools.com</p> <p>Starkville Oktibbeha SD (MS) 5,001 students, PK-12 Wes Gordon 662.418.7783 wgordon@starkvillesd.com</p> <p>St. Charles CUSD 303 (IL) 12,500 students, PK-12 Jillian Barker 630.613.0694 jillian.barker@d303.org</p>	<p>Anne Arundel County PS (MD) 85,000 students, K-12 Dr. Joanna Tobin 410-570-0366 jtobin@aacps.org</p> <p>Frederick County SD (MD) 43,250 students, PK-12</p> <p>Fort Worth ISD (TX) 75,000 students, K-12 Tobi Jackson tobi.jackson@fortworthsparc.org</p> <p>Lincoln PS (NE) 42,000 students, K-12 Connie Duncan 402.419.0070</p> <p>Los Angeles USD (CA) 640,000 students, K-12 Monica Garcia 213.505.6122 Kelly Gonez kelly.gonez@lausd.net</p> <p>Montgomery County PS (MD) 165,000 students, K-12 Brenda Wolff 240.740.3030</p> <p>San Francisco USD (CA) 50,000 students, K-12 Jenny Lam 415.699.5349 jennylam@sfsud.edu</p> <p>Seattle PS (WA) 50,000 students, K-12 Brandon Hersey brandon.hersey@seattleschools.org</p>

SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

2020-2021

0 – 2,500 students	2,501 – 5,000 students	5,001 – 7,500 students	7,501 - 15,000 students	15,000+ students
<p>Lake Forest Elementary SD 67 (IL) 1,600 students, grades K-8 Suzanne Sands 847.878.6764, ssands@lfschools.net</p> <p>Lake Forest Community High SD 115 (IL) 1,500 students 9-12 Jenny Zinser 847.778.6174; jzinser@lfschools.net</p> <p>Northbrook SD 27 (IL) 1,330 students, PK-8 Helen Melnick 847-275-7946</p> <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) 930 students, PK-12 Tracy Smithback-Travis 608-423-4345</p>	<p>Charlottesville City Schools (VA) 4,300 students, K-12 Lisa Larson-Torres torresl1@charlottesvilleschools.org</p> <p>Cheltenham SD (PA) 4,500 students, PK-12 Pam Henry 215.446.5253</p> <p>Niles Township HSD 219 (IL) 4,500 students, grades 9-12 Naema Abraham 773.953.6870 naeabr@d219.org Joe Nowik 847.800.6726 joenow@d219.org</p> <p>Orinda Union Elementary SD (CA) 2,529 students, K-8</p> <p>Roseland SD (CA) 2,800 students, PK-12 Laurie Biggers 707.545.0102 ext 4218 lbiggers@roselandsd.org</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> <p>Poudre School District (CO) 54 30,000 students K-12 Christophe Febvre 970.227.0282 Rob Petterson 970.218.7722 rpetterson@psdschools.org</p>

SELECT HYA SUPERINTENDENT SEARCH HISTORY WITH REFERENCES

2019-2020

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>Blaine County SD (ID) 3,300 students, PK-12 Lara Stone 208.720.2649 Keith Roark keithroark@blaineschools.org</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 Maria Langston 314.520.5666</p> <p>Oyster Bay-East Norwich CSD (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 SD (WI) 1,923 students, PK-12 Casey Judd 920.723.3035 cejudd@idcnet.com</p>	<p>Homewood City SD (AL) 4,200 students, K-12 Charlie Douthit 205.368.7925</p> <p>Lyons Township HSD 204 (IL) 4,000 students, grades 9-12 Thomas Cushing twcushings@sbcglobal.net</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</p> <p>Pemberton Township Schools (NJ) 5,000 students, PK-12 Tom Bauer 609.410.8399 Jeff Wilson 609.760.0477</p> <p>Verona Area SD (WI) 5,800 students, K-12 Meredith Christensen 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@salinacity.k12.ca.us</p> <p>Traverse City Area PS (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>Bend-La Pine Schools (OR) 18,000 students, K-12 Melissa Barnes Dholakia Melissa.barnesdholakia@schoolboard.bend.k12.or.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</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

2018-2019

0 – 2,500 students	2,501 – 5,000 students	5,001 – 7,500 students	7,501 - 15,000 students	15,000+ students
<p>Las Lomas Elementary SD (CA) 1,300 students, K-8 John Earnhardt john.earnhardt@gmail.com</p> <p>Malverne Union Free SD (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@pvsd.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 Dr. Gerald Crisonino 201.915.6226</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 & 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

2017-2018

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 831.524.0262	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
Live Oak School District (CA) 2100 students, K-8 Jeremy Ray 408.489.0476	Lafayette School District (CA) 3,568 students, TK-8 Teresa Gerringer 510.599.9152	Montclair School District (NJ) 6,700 students, K-12 Laura Herzog 973.699.1541 lherzog@montclair.k12.nj.us	Davenport CSD (IA) 16,000 students, PK-12 Ralph Johanson 563.381.4598 rjohanson1@msn.com Bruce Potts 563.355.7388 pottsb@davenportschools.org	Billings Public School District 2 (MT) 16,000 students, K-12 Greta Besch Moen 406.248.4360
Loma Prieta Joint Union ESD (CA) 941 students, PK-8 Deana Arnold 408.656.4148	Lawrence Township PS (NJ) 3,800 students, PK-12 Dana Drake 201.527.8464		East Aurora SD 131 (IL) 14,000 students, K-12 Kimberley 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		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
Orange City School District (OH) 2,024 students, K-12 Melanie Weltman 216.378.6989 mweltman@orangeccsd.org	Los Gatos-Saratoga Union HSD (CA) 3,287 students, 9-12 Robin Mano rmano@lgsuhdsd.org		Huntley CSD 158 (IL) 9,500 students, K-12 Tony Quagliano 847.254.2885 Michael Fleck 847.707.8829	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@scsd8.org		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
			Palo Alto Unified School District (CA) 12,500 students, K-12 Ken Dauber 650-906-4340 kdauber@pausd.org	Newark Public Schools (NJ) 35,000 students, K-12 Josephine Garcia 973-733-7333
				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

Mike Richie Wisconsin HYA Searches

School District	Dates	District Reference	Phone Number	Email	HYA Associates	Hired Superintendent
Whitewater, WI	2019-20	Casey Judd Board President	920- 723-3035	cejudd@idcnet.com	Mike Richie / Pat Neudecker	Caroline Pate-Hefty (July 1, 2020)
Verona, WI	2020-21	Meredith Christensen Board President	847-724-8465	christem@verona.k12.wi.us	Mike Richie / Pat Neudecker	Tremayne Clardy (July 1, 2021)
Fond du Lac, WI	2020-21	Dr. Susan Jones Board President	920-979-1364	joness@sb.fonddulac.k12.wi.us	Mike Richie / Pat Neudecker	Jeff Fleig (July 1, 2021)
Yorkville Jt. #2	2020-21	Dave Callewaert Board Member	414-510-2485	dave.callewaert@yorkville.k12.wi.us	Mike Richie	Mark Rollefson (July 1, 2021)
Tomahawk, WI	2021-22	Kay Kissinger-Wolf Board President	715-367-8284	kissingerwolfk@tomahawk.k12.wi.us	Mike Richie / Pat Neudecker	Wendell Quesinberry (July 1, 2022)
Johnson Creek, WI	2021-22	Richard Wrench Board President	920-988-4878	wrenchr@johnsoncreekschools.org	Mike Richie / Glenn Schilling	Mark Gruen (July 1, 2022) 58
Stratford, WI	2021-22	Chris Dickinson Board President	715-323-8457	cdickinson@grapps.stratford.k12.wi.us	Mike Richie	Nathan Lehman (July 1, 2022)
New Richmond, WI	2021-22	Holly Butler Dir. of Human Resources	715-243-7443	hbutler@newrichmond.k12.wi.us	Mike Richie/ Pat Neudecker	Troy Miller (July 1, 2022)
Cedarburg, WI	2021-22	Rick Leach, Board President	262-894-4284	rleach@cedarburg.k12.wi.us	Mike Richie/ Pat Neudecker	Jeridon Clark (July 1, 2022)
Monroe, WI	2021-22	Ron Olson Business Administrator	608-293-0320	ronolson@monroe.12.wi.us	Mike Richie/ Pat Neudecker	Rodney Figueroa (July 1, 2022)
Rosholt, WI	2021-22	Karla Schoofs Board President	715-572-1591	karlaste5@gmail.com	Mike Richie/ Pat Neudecker	Dennis Kaczor (July 1, 2022)
Watertown, WI	2021-22	Margaret Brady Dir. of Hum. Resource	920-262-1460 ext. 3245	bradym@watertown.k12.wi.us	Mike Richie/ Pat Neudecker	Jarred Burke (July 1, 2022)
Pittsville, WI	2021-22	Mandy Hoogesteger Board President	715-213-9277	hoogeman@pittsville.k12.wi.us	Mike Richie	Jason Knott (July 1, 2022)

Mike Richie Wisconsin HYA Searches

School District	Dates	District Reference	Phone Number	Email	HYA Associates	Hired Superintendent
Menomonee Falls, WI	2022-23	Leia Scoptur Dir. of Human Resources	262-250-3202	scopeva@sdmfschools.org	Mike Richie/ Pat Neudecker	Interim Placed: James Heiden Extended Interim Contract
Colby, WI	2022-23	Bill Tesmer	715-316-2569	wtesmer@colby.k12.wi.us	Scott Wench / Mike Richie	Patrick Galligan (July 1, 2023)
Raymond, WI	2022-23	Gwen Keller	414-350-1242	kellgwe@raymond.k12.wi.us	Mike Richie	Interim Placed: Mike Garvey

Mike Richie Out of State HYA Searches

School District	Dates	District Reference	Phone Number	Email	HYA Associates	Hired Superintendent
Lincoln, NE	2021-22	Connie Duncan Board President	402-419-0070	connie.duncan@lps.org	Mike Richie/Brian Ewert / Heather Williams	Paul Gausman (July 1, 2022)
Strasburg, CO	2021-22	Michael Marrero Board President	303-434-0649	mmarrero@strasburg31j.com	Mike Richie / Brian Ewert	Dan Hoff (July 1, 2022) 59
South Sioux City, NE	2022-23	Lance Swanson Dir. of Communication	402-494-2425	lance.swanson@sscads.org	Mike Richie	Rony Ortega (July 1, 2023)
Littleton, CO	2022-23	Diane Leiker Chief Comm. Officer	303-347-3387	dleiker@lps.k12.co.us	Mike Richie / Heather Williams / Scott Siegfried	Todd Lambert (July 1, 2023)
Iowa Association of School Boards	2022-23	Elizabeth Brennan	515-778-5123	ejcb@me.com	Mike Richie / Todd Strom	DT MaGee (July 1, 2023)
Aurora, CO	2022-23	Debra Gerkin Board President	303-364-3794	degerkin@aurorak12.org	Mike Richie / Scott Siegfried / Micah Ali	TBD
Hayden, CO	2022-23	Tammie Delaney Board President	970.846.1404	tdelaney@haydenschools.org	Mike Richie	TBD

HYA Sample Interview Questions

General and Personal

1. Please tell us why you are interested in this position and why you are considering leaving your present position?
2. What specific capabilities do you bring to this position?
3. How would you describe yourself?
4. What has been the most challenging task you have faced and how did you deal with it?
5. What are your long-term career objectives?
6. How do you spend your spare time? What activities or hobbies do you enjoy?
7. How do you keep yourself professional and personally “renewed”?

Board–Superintendent Relationships and Responsibilities

1. Describe how you keep your Board fully informed between meetings?
2. Describe how you would prepare an agenda for the next school Board meeting. What is your procedure for determining how items get on the agenda?
3. How would you prepare the Board to make a decision on a politically sensitive or controversial issue?
4. How do you feel the annual evaluation of Board and superintendent performance should be handled? What elements should be included in the evaluation?
5. What is your role in developing school Board policy?
6. What role should the superintendent play in orienting new Board members? How should this be accomplished?

District Management

1. Describe your concept of management/leadership.
2. How would you describe your management philosophy? What are your managerial strengths and weaknesses?
3. How would you determine long-range and short-range goals for the District? Whom would you involve in the planning process? What would you consider as the “strategic” component of such a plan?
4. How would you implement short and long-range District goals? How would you monitor and evaluate their implementation?
5. When, if ever, do you feel the use of faculty or citizen advisory committees is appropriate? How would you use them?
6. What do you do to encourage participation of employees in organizational decisions?
7. What kind of decisions or responsibilities do you delegate to others? How do you monitor the performance of those that report to you?
8. In what administrative effort have you failed? What did you learn from the experience?
9. What has been the most unpopular decision you have had to make and how did you handle the reaction to this decision?
10. Of what administrative success are you most proud? Why?
11. How would you go about evaluating and perhaps realigning an administrative team?
12. How would you determine whether an excellent school system needs to be improved?
13. Describe your experience in working with other governmental agencies, such as the legislature, executive offices or municipalities.

Fiscal Management

1. Describe your experience/knowledge of school finance.
2. Describe the budget planning process you have used.
3. What has been your experience with budget management, budgetary controls and budget reduction?
4. What responsibilities have been assigned to the business manager in your organization? How would you utilize such an individual in this District?

Personnel

1. What procedures do you find most useful in recruiting administrators and teachers?
2. Describe your experience with negotiations. What role do you prefer to play? How much has your Board been involved?
3. How do you maintain a collaborative relationship with the teachers' association?
4. What kind of authority do you give to principals and how do you hold them accountable?
5. If a teacher complained to you about a principal's written evaluation of his/her/their room visit, what would you do?
6. What kind of staff development program would you develop for the teaching staff and for administrative staff?
7. When recruiting staff, how would you reconcile a District's need for talented teachers with the growing need for qualified and enthusiastic extra-curricular activity sponsors?

Public Relations

1. Give some specific examples of ways you have successfully communicated with citizens about your District's problems and accomplishments.
2. How is the content of regular reports to the community determined?
3. What evidence can you cite which indicates your success in gaining Board and community support for educational programs?
4. How important do you feel it is for the superintendent to be visible throughout the community? How would you decide what activities/organizations are worth the time and effort of active participation?
5. How would you inform the staff of action taken at the last school Board meeting?
6. How would you handle parent complaints about teacher performance?

Curriculum

1. How would you conduct an assessment of the District's current curriculum?
2. Discuss how you would ensure the relevance of a District's educational program for students.
3. Describe an appropriate role for the Board in curriculum development.
4. What curricular innovations have you implemented in your District?
5. What problems have you experienced in meeting state and federal special education mandates?
6. What current federal and/or state requirements should the Board be aware of and how do they impact current business, organizational and curricular practices?

Contract and Terms of Employment

1. If chosen, would you accept a multi-year contract?
2. Would you be able to start on July 1st? If not, how soon?
3. How would you propose to have your performance evaluated? By whom? On what criteria? How often?

Commitment to Diversity

1. How has your [education] [previous work experience] prepared you for [working with] [teaching] a diverse population?
2. How has your background and experience prepared you to be effective in an environment [that values diversity] [is committed to inclusion] [where we see awareness of and respect for diversity as an important value]?
3. What specific experiences have you had addressing concerns of diverse [communities] [students] [populations] at your current or previous institution? What role have you taken in addressing those concerns?
4. Please tell us about an instance when you have demonstrated leadership or commitment to equity in your work.
5. What programs or initiatives have you been part of to [work with diverse populations] [address diversity issues], and specifically what was your role in those efforts?
6. Our school district is highly concerned with issues of diversity and equity. How has your past work demonstrated an active commitment to equity?
7. Can you describe an innovative [program] [activity] addressing diversity that you were an integral part of developing?
8. In what ways have you demonstrated commitment and sensitivity to the importance of diversity in your previous experience?
9. Describe a time when you worked to incorporate diversity issues or diverse communities into [a project or event you worked on].
10. What training and experience do you have in developing and implementing [services and programs] that incorporate diversity?
11. Describe your experiences in strategic planning related to diversity.
12. Describe your experiences in assessing diversity initiatives and their outcomes.
13. What experiences have you had with recruiting, hiring, training, and/or supervising a diverse workforce?
14. What is the most challenging situation dealing with diversity that you have faced and how did you handle it?
15. If we were to ask your colleagues or supervisor at your current position, what do you think they would say about your diversity background, experience and contributions?
16. What areas of diversity do you think you have to learn more about and how would you go about doing it?
17. What have you done to further your knowledge or understanding about diversity? How have you applied your learning?
18. What role has diversity played in your [approach to teaching _____] [teaching strategies] [management/leadership]?
19. What kinds of experiences have you had in relating with people whose backgrounds are different than your own?
20. Have you ever realized you had said or done something that may have been offensive to a [colleague] [student] [co-worker]? How did you respond to that realization, and what was the outcome?
21. In your experience, what are the challenges faced by members of historically underrepresented groups [in the workplace] [in successfully completing their education]? What strategies have you used to address these challenges, and how successful were those strategies?



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

07/12/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER DSP Insurance Services, Inc. 1900 E Golf Rd Ste 650 Schaumburg IL 60173	CONTACT NAME: Sharon L Panos PHONE (A/C No. Ext): (847) 934-6100 E-MAIL ADDRESS: spanos@dspins.com	FAX (A/C, No): (847) 934-6186	
	INSURER(S) AFFORDING COVERAGE		
INSURED HYA Corporation 5600 N. River Rd. Ste 180 Rosemont IL 60018	INSURER A: Citizens Insurance Co Of Illin		NAIC # 10714
	INSURER B: Allmerica Financial Benefits I		
	INSURER C: Federal Insurance Company		20281
	INSURER D:		
	INSURER E:		
INSURER F:			

COVERAGES

CERTIFICATE NUMBER: Cert ID 37552

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
B	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:			5478201	07/01/2022	07/01/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ Included
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ Incl in GL BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ None			5478201	07/01/2022	07/01/2023	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	PE4545201	07/01/2022	07/01/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	Professional Liability			82256406	07/01/2022	07/01/2023	Retention: \$10,000 \$ 2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**

Sample

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

63

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A Proposal Prepared for

**Waunakee Community
School District
Waunakee, Wisconsin**

for

*The Search and Selection of a
Superintendent of Schools*

submitted by

MCPHERSON  JACOBSON, LLC

EXECUTIVE RECRUITMENT & DEVELOPMENT



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Omaha, Nebraska 68144
Phone: 888-375-4814/402-991-7031
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FAX: 402-991-7168 ♦ EMAIL: MAIL@MACNJAKE.COM ♦ WEBSITE: WWW.MACNJAKE.COM

May 3, 2023

Board of Education
Waunakee Community School District
905 Bethel Circle
Waunakee, Wisconsin 53597

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

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

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

With over 130 consultants across the United States, McPherson & Jacobson has been successfully conducting searches for governing boards since 1991.

Our contact information:

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

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

Sincerely,

Dr. Norm Ridder

McPherson & Jacobson L.L.C.

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05/23

Executive Summary

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

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

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

About McPherson & Jacobson

The McPherson & Jacobson Difference

“It’s About the Kids”

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

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

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

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

Leading National Search Firm

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 940 superintendents** and other officials in public and non-profit organizations across the United States. **McPherson & Jacobson is one of the leading national superintendent search firms.**

Nationwide Network of Experienced Consultants

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

Sustainability in Leadership

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

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

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

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

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

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

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

Applicant Diversity

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

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

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

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

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

McPherson & Jacobson, L.L.C. Wisconsin Consultants

Dr. Vance Dalzin, Retired Superintendent, Shorewood

Dr. Brian Hanes, Retired Superintendent, Oostburg

Mr. Damian La Croix, Superintendent, Suamico

Mr. James Kuchta, Retired Superintendent, Marshfield

Dr. Kristen Taylor, Director of Human Resources, Oconomowoc

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

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
School District of La Crosse	La Crosse	2019/20	6,500
West Bend School District	West Bend	2019/20	6,300
Oconomowoc Area School District	Oconomowoc	2021/22	5,300
Chippewa Falls Area Unified School District	Chippewa Falls	2019/20	5,100
Pulaski Community School District	Pulaski	2019/20	3,700
DeForest Area School District	DeForest	2015/16	3,625
School District of Fort Atkinson	Fort Atkinson	2016/17	2,900
School District of Sheboygan Falls	Sheboygan Falls	2019/20	1,688
Columbus School District	Columbus	2021/22	1,360
Cedar Grove-Belgium School District	Cedar Grove	2019/20	1,350
Wilmot Union High School District	Wilmot	2021/22	930
Bristol School District No. 1	Bristol	2015/16	770
Swallow School District	Hartland	2022/23	479

Consultant Team

Bios

Dr. Kristen Taylor



Dr. Kristen Taylor joined McPherson & Jacobson in 2022.

Dr. Taylor has been a leader in recruitment and hiring of highly effective administrators and teachers that are “best fit” for PK-12 public schools for over sixteen years both as an innovative Director of Human Resources in urban and suburban settings and as a consultant for individual organizations. While she has recently joined the team she brings with her over forty successful searches for Superintendent, Assistant Superintendent and Directors. Her research and work has been focused on increasing the effectiveness of recruitment and hiring by aligning and infusing this most important work with the mission and vision of the organization searching for great talent. Dr. Taylor brings a sense of humor and personal interaction that help search teams work at their best.

Dr. Taylor is currently the lead consultant for the Swallow School District search, and assisted Dr. Dalzin in the Columbus School District superintendent search.

Dr. Vance Dalzin



Dr. Vance Dalzin joined McPherson & Jacobson in July 2021.

Dr. Dalzin retired from serving as the Superintendent of the School District of Oakfield in Wisconsin in June 2021. He is currently an assistant Professor of Education at Carthage College.

He has thirty-four years of experience in public education, including thirty in leadership positions (11 as superintendent, 17 as principal, and 3 as assistant principal). He has worked in urban, suburban, and rural school districts and at the district, elementary, middle and high school levels. The school districts he served as superintendent in the last six years were rated as Significantly Exceeds Expectations by the Wisconsin Department of Public Instruction for five of those years. Dr. Dalzin was recently appointed to serve on the Editorial Review Board for the AASA Journal of Scholarship and Practice.

He received his B.S. from the University of Wisconsin-Whitewater, his M.S. from the University of Wisconsin-Milwaukee, and his Ed.D. from Edgewood College in Madison, WI.

Dr. Dalzin has most recently participated in superintendent searches for the following Wisconsin school districts: Wilmot Union High School District, Columbus School District, Oconomowoc Area School District, and Swallow School District. He was the lead consultant for Wilmot Union High School District and Columbus School District superintendent searches.

Resumes

Dr. Kristen Taylor
West Allis, Wisconsin 53227
Email: k_taylor@macnjake.com
Phone: 414-491-6913

Educational Background

Ph.D.	2014	University of Wisconsin – Madison	Educational Leadership and Policy Analysis
M.Ed.	1996	University of Wisconsin – Milwaukee	Educational Leadership
B.S.Ed.	1986	Concordia University – Mequon	Elementary Education and Music Education

Professional Experience

Dates	Title	District
2022 to Present	Consultant	McPherson & Jacobson, L.L.C.
2021 to 2022	Interim Superintendent	Oconomowoc Area School District
2018 to Present	Director of Human Resources	Oconomowoc Area School District
2016 to Present	Director of Clinical Experiences & Instructor	University of Wisconsin – Milwaukee
2007 to 2016	Director of Human Resources	School District of West Allis West Milwaukee
2001 to 2007	Staffing Specialist	Milwaukee Public Schools
1999 to 2001	Science Curriculum Supervisor	Milwaukee Public Schools
1997 to 1999	Math and Science Teacher Leader	Milwaukee Public Schools
1996 to 1997	Interim Principal	Milwaukee Public Schools
1987 to 1999	Teacher	Milwaukee Public Schools
1986 to 1987	Teacher	St. John’s Lutheran-Beloit

Dr. Vance Dalzin
Shorewood, Wisconsin 53211
Email: v_dalzin@macnjake.com
Phone: 262-497-2661

Educational Background

Ed. D.	2005	Edgewood College	Educational Leadership
M.S.	1992	University of Wisconsin - Milwaukee	Administrative Leadership and Supervision in Education
B.S.E.	1987	University of Wisconsin - Whitewater	History/Political Science

Professional Experience

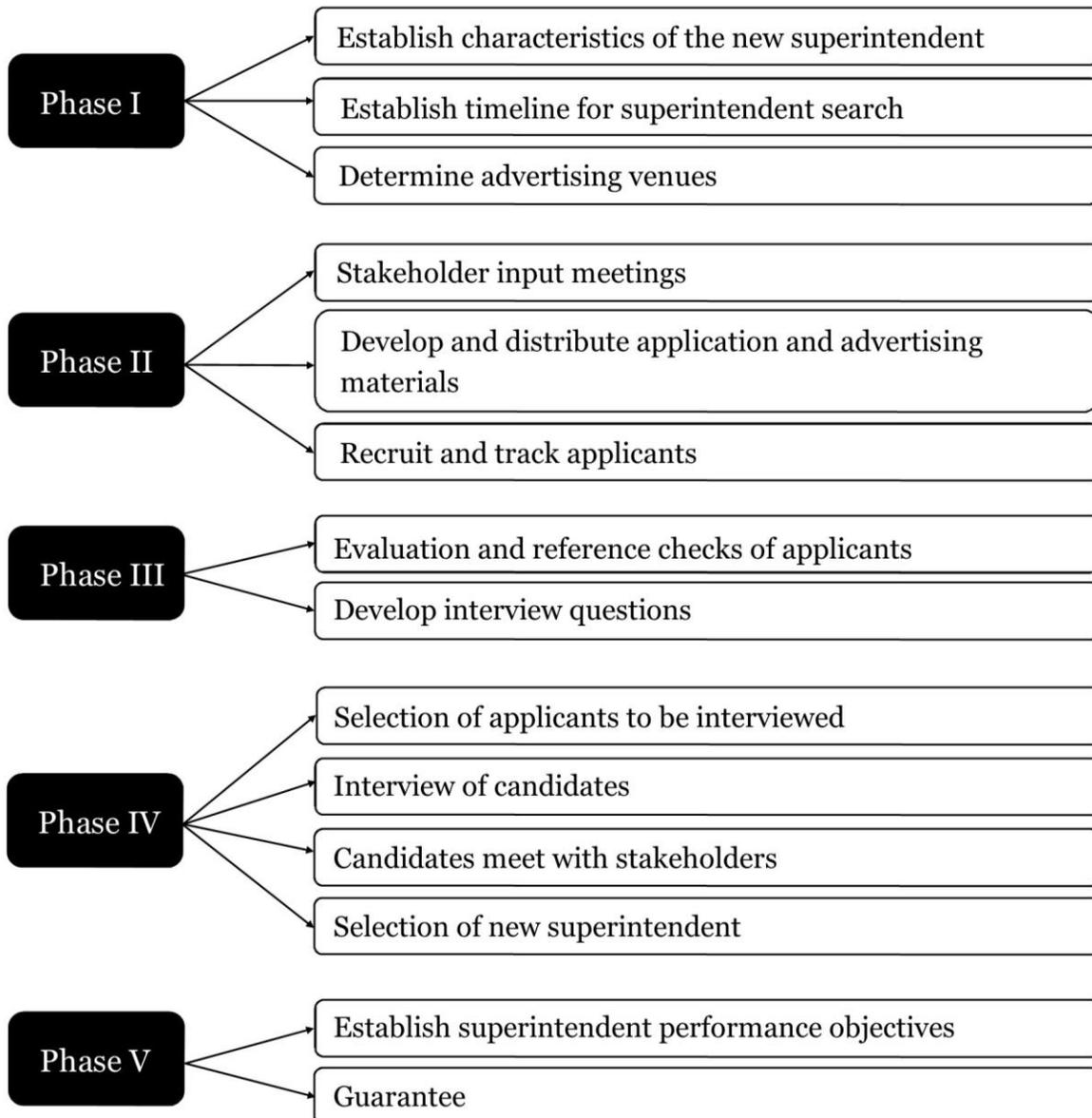
Dates		Title	District	Location
2022	to Present	Assistant Professor of Education	Carthage College	Kenosha, WI
2021	to Present	Consultant	McPherson & Jacobson, L.L.C.	Omaha, NE
2021	to 2022	Interim Superintendent	Wilmot Union High School District	Wilmot, WI
2016	to 2021	Superintendent	School District of Oakfield	Oakfield, WI
2013	to 2016	Superintendent	Fox Point J2 School District	Fox Point, WI
2011	to 2013	Superintendent	Williams Bay School District	Williams Bay, WI
2005	to 2013	Adjunct Professor	Aurora University, Williams Bay Campus	
1999	to 2011	High School Principal	Whitewater High School	Whitewater, WI
1994	to 1999	High School Principal	Wilmot Union High School District	Wilmot, WI
1991	to 1994	Assistant Principal	Wilmot Union High School District	Wilmot, WI
1989	to 1991	Teacher & Coach	Kenosha Unified School District	Kenosha, WI
1987	to 1989	Teacher & Coach	Waterloo Public Schools	Waterloo, WI

Professional Organization Memberships

Name of Organization	Dates			Offices Held
American Association of School District Administrators Journal of Scholarship and Practice	2019	to	Present	Editorial Review Board Member
National Superintendent Roundtable	2018	to	Present	
Moraine Park Technical College	2018	to	2021	K-12 Advisory Council
Cardinal Stritch University	2017	to	Present	Doctoral Dissertation Committee Member
George Williams College of Aurora University	2010	to	2013	Doctoral Dissertation Committee Member
Association of Wisconsin School Administrators	2009	to	2011	Board of Directors
National Association of Secondary School Principals	2008	to	2010	Publications Advisory Council
Association of Wisconsin School Administrators	2003	to	2008	Senior H.S. Advisory Council

Search Process

Five Phases of a Superintendent Search



Phase I—Initiating the Search Process

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

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

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

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

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

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

- ✓ **Identify appropriate stakeholder groups.**

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

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

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

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

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

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

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

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

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

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

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

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

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

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) that allows applicants to access all the application materials and apply online. The website averages over 225,000 hits per month.

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

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

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

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

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

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

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

✓ **Confidentiality of Applicants**

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

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

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

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

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

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

Phase III—Applicant Screening

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

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

✓ **Conduct reference checks.**

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

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

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

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

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

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

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

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

Phase IV—Reviewing Candidates with the Board, Interviews

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

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

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

✓ **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.

✓ **Conduct background checks.**

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

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

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

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

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

Phase V—Transition with Success

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

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

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

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

✓ **Provide a guarantee.**

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

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

Communicating and Working with the Board

The consultants will be in contact with the board president during the search as necessary to give updates on the progress. The consultants are available by phone or email to address any concerns or answer any questions the board has during the search process.

The McPherson & Jacobson consultants will meet with the entire board for three meetings:

1. Initial meeting to determine the criteria for the new superintendent, advertising venues, and stakeholder groups for input meetings.
2. Review of stakeholder input. At this meeting, the input obtained from the stakeholder meetings will be presented to and reviewed with the board. In addition, the interview schedule, interview questions, and salary for the new superintendent will be discussed at this meeting.

3. Presentation of the candidates to the board. At this meeting, the consultants will give the board a complete list of those who completed the application process, and will present additional information about the applicants that most closely meet the district's criteria. The consultants will assist the board in determining which applicants it wishes to interview.

In addition, the consultants will send regular emails to the board members keeping them abreast of the status of the search.

The consultants are available to meet with the board for additional issues, if the board desires; however, there is an additional fee for these meetings.

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.

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

- At the beginning of the search (**Summer 2023**)
 - 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 (**August-September 2023**)
 - 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 (**late October 2023**)
 - 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 (**mid-November 2023**)
 - Consultants provide information to the board on all applicants who completed the process
 - Consultants present summary profiles and video interviews of qualified candidates to the board
 - The board selects the candidates it wants to interview
 - Criminal/financial/educational degree verification background checks are conducted on the selected finalists
 - McPherson & Jacobson notifies each applicant not selected for an interview

- Soon after the board selects their candidates (**December 2023**)
 - Semi-finalist interviews are conducted (if chosen by the board)
 - The board interviews its final candidates
 - The board selects their new superintendent
 - McPherson & Jacobson's consultants contact each candidate who was interviewed to notify them of their status

*Responsibilities of Waunakee Community School District
Wisconsin and McPherson & Jacobson, L.L.C.*

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

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

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

Stakeholder Involvement

Obtaining stakeholder input is an integral part of McPherson & Jacobson's search process. Since 1991, McPherson & Jacobson has conducted over 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.

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

Process for Including Ethnically Diverse Communities

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

Process for Obtaining Online Stakeholder Input

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

Recruiting, Identifying, and Screening Applicants

Advertising the Position

The consultants will discuss with the board the advertising options available and the pricing for them. The minimum advertising we recommend are the following online venues: AASA, *TopSchoolJobs.org*, ALAS (Association of Latino Administrators & Superintendents), and NABSE (National Alliance of Black School Educators).

McPherson & Jacobson will not place any media advertising without approval from the board.

Additional advertising/recruiting tools provided at no additional cost to the district:

- The opening and application materials will be posted on the McPherson & Jacobson website which averages 225,000 hits per month
- Information regarding the position will be sent to the over 125 McPherson & Jacobson consultants located nationwide asking for names of potential applicants
- The over 1,000 potential applicants registered with McPherson & Jacobson will receive an email giving them opportunity to apply
- Posted on McPherson & Jacobson's social media accounts: Facebook, LinkedIn, and Twitter
- Vacancy announcements sent to school board and school administrator associations

Identifying and Recruiting Applicants

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

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

McPherson & Jacobson stays current with trends in educational leadership by being an active participant and presenter at many national and state education conferences. We participate in Job Central at the American Association of School Administrators (AASA) Conference, the National School Boards Association annual conference, and others such as the AASA Women's & Minority Leadership Conference. In addition, McPherson & Jacobson consultants are members of the National Alliance of Black School Educators (NASBE), and the Association of Latino Administrators and Superintendents (ALAS).

Once the board has identified its selection criteria, the consultants of McPherson & Jacobson will immediately begin to identify potential applicants both locally and nationally. McPherson & Jacobson has over 130 consultants across the United States; 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. Those candidates will be invited to apply. Some of our best candidates may not be actively seeking another position and will need to be recruited.

We do not maintain a stable of candidates, but we do follow the careers of successful administrators. Individuals who are currently looking to take a new position are encouraged to register with us so they can receive notification of the vacancies we are representing. We have over 1,000 potential applicants currently registered with McPherson & Jacobson who will receive notification of the superintendent opening. Additionally, we will vigorously pursue current or emerging leaders through personal contact.

We have maintained an ongoing presence at the American Association of School Administrators' Job Central at their annual conference where we have an opportunity to meet and interact with potential applicants. We maintain an ongoing presence at the National Association of School Boards' annual conference. We represent two state school board associations as their superintendent search process; therefore, we are the only private firm allowed to participate in their Job Central.

Our searches draw applicants from across the United States. Most searches have applicants from 10 to up to 25 states apply. Some of our searches also have applicants from outside the United States.

Applicant Diversity

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

McPherson & Jacobson has **over 130 consultants** across the nation. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensures your search results in quality leadership for education excellence. In addition, McPherson & Jacobson consultants are members of the National Alliance of Black School Educators (NASBE), and the Association of Latino Administrators and Superintendents (ALAS).

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 our placements have been women or ethnically diverse candidates.

Screening, Reference Checks, Interviews of Final Applicants

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 comparing it against the selection criteria.

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 could speak of the applicant's qualification. We repeat the process until we have

complete knowledge of the applicant's strengths and weaknesses. If we find any biases or controversial issues during this comprehensive vetting process, we will provide this information to the board.

The consultants will present a complete list of applicants to the board for its review. We do not eliminate any applicants. We will submit a short list of those applicants who we feel most closely meet the district's criteria and will present a written analysis for each.

Upon reviewing the applicants, the consultants will assist the board in determining which applicants it wishes to consider as candidates for interviews.

The consultants will assist the board in establishing the interview schedule. Working with the board, the consultants will set up an interview schedule that will give the candidate a tour of the district and community. The consultants will also help the board identify groups for each candidate to meet. Typically, the same groups the consultants met with to receive input into the selection process will also spend time with each candidate. Finally, the consultants will help coordinate the formal and informal interview process with the board.

The consultants will contact each final candidate; notifying them they are a finalist for the position and scheduling their interview date. The consultants will be the contact for answering any questions and coordinating the candidates' visits to the district.

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

Cost Proposal

Investment

The fee for conducting the superintendent search is \$11,500 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 not to exceed amount is \$16,500.*

Included in this amount is:

- Phases I-V of the superintendent search process
- Thirty (30) days on AASA (American Association of School Administrators)
- Thirty (30) days on TopSchoolJobs (Ed Week online)
- Thirty (30) days of advertising on NABSE (National Alliance of Black School Educators)
- Six (6) weeks of advertising on ALAS (Association of Latino Administrators & Superintendents)
- Thirty (30) day single listing on the Wisconsin School Leadership Center website
- One (1) day of in-person stakeholder meetings
- Online stakeholder input surveys
- Video interviews of candidates (five (5) video interviews are included in the not to exceed amount)
- Criminal/financial/credential verification background check for candidates chosen by the board for interviews (four (4) background checks are included in the not to exceed amount)
- 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.
- 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.

Personality/Strengths Assessments Option

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

McPherson & Jacobson Guarantees

Client Satisfaction

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

If the board chooses to use our complete service, we will guarantee our process for **two (2) years**. If the person selected leaves the position, for whatever reason, within the guarantee period, we will repeat the process at no charge except actual expenses. *The guarantee is valid only if the board is comprised of fifty (50) percent or more of the member who hired the superintendent.*

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

Price Match

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

Recruiting the Selected Candidate

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

Payments of Fees to McPherson & Jacobson, L.L.C.

- One-half (1/2) of the contracted fee due when the contract is signed;
- All advertising/media expenses will be due when the candidates are presented to the District for consideration; and
- The final one-half (1/2) of the contracted fee due, plus all remaining expenses shall be due and owing, upon the completion of the services

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.

Sample Contract

CONTRACT FOR SERVICES

This Contract for Services (“Agreement”) is made and entered into as of the date set forth below by and between **McPherson & Jacobson, L.L.C.** (hereinafter referred to as “Consultant”) and the _____ **School District, (city), (State)**, Board of (Education/Directors/Trustees, etc.) (hereinafter referred to as the “District”).

1. **Services.** The Consultant agrees to provide the following services, as specifically selected by the District in Section 3 below.

PHASE I

Working with the District, and any groups identified by the District, Consultant will:

- Using a group consensus, decision-making process with the District, identify the desirable characteristics of the future superintendent.
- Establish appropriate timelines and target dates for the selection process.
- Assist the District in establishing compensation parameters for final candidate.
- Determine with the District, media advertising venues

PHASE II

In Phase II, Consultant will:

- Identify and solicit input from various groups identified by the District.
- Prepare summaries of the various groups’ input and submit those summaries to the District.
- Develop an application form unique to your vacancy that reflects the criteria established by the District.
- Develop a promotional brochure (optional), which will:
 - describe the demographics of the community
 - give an overview of the school district and its outstanding features
 - list the selection criteria that the District identified
 - outline the timeline for the selection process
 - outline the application procedures
- Develop a vacancy announcement and advertise the position with the appropriate media and professional organizations.

- Post application information and notify interested applicants.
- Actively recruit applicants who will meet the district's needs.
- Keep applicants informed of their status in the selection process.

PHASE III

In Phase III, Consultant will:

- Read and evaluate all completed applicant files.
- Evaluate each applicant based upon the criteria and characteristics established by the District.
- Conduct Internet searches on the final candidates.
- Conduct complete reference checks on final candidates.
- Develop a set of interview questions for the District to use that reflects the identified criteria and characteristics.
- Assist the District in establishing an interview schedule.
- Assist the District in establishing interview and visitation procedures.

PHASE IV

In Phase IV, Consultant will:

- Review the top candidates with the District.
- Assist the District members in determining which candidates it wishes to interview.
- Provide video interviews of the shortlist candidates to the District.
- Review interview questions with the District and provide an interview form.
- Review the interview and visitation procedures with the District.
- Coordinate and schedule meetings with the finalists and stakeholder groups identified by the District.
- Provide a process for the stakeholder groups to submit input to the District concerning all the finalists.
- Contact all final candidates and schedule interview times.
- Conduct criminal/financial/educational degree verification background checks on the candidates selected for interviews.
- Notify all applicants not selected for an interview.

- Assist the District and final candidates in making arrangements for visiting the school district.
- Establish and coordinate procedures for the significant other/partner's visitation to the district, if applicable.
- Keep all candidates informed of their status in the selection process.
- After the selection has been made, personally contact each finalist not selected.

PHASE V

In Phase V, Consultant will:

- Work with the District and the new superintendent to establish performance objectives for the superintendent.
- Provide a guarantee.** (Length of guarantee period: _____).

The Consultant will provide the following guarantee: *Consultant will repeat the process at no additional charge, except for all actual expenses.*** The guarantee will be valid if:

- If the candidate ultimately selected by the District ends their employment with the District within the above-referenced guarantee period.
- If the District contracts for the Consultant's services through Phase V.
- If the district makes timely payments to the Consultant.
- The Phase V meeting is held within four (4) months of the start date of the candidate.
- The board has retained fifty (50) percent or more of the same membership that hired the candidate.

If the District chooses not to hold the meeting to Establish Performance Objectives for the new superintendent, the guarantee is null and void.

2. Expenses. In addition to the fee referenced in Section 3 below, District shall also reimburse Consultant for all expenses incurred by the Consultant, including, without limitation:

- All expenses for advertising the vacancy.
- Office expenses for the search.
- Telephone charges for reference checks and screening candidates.

- Travel and expenses of all applicants and consultant representatives for all trips to the District.
- Preparation of video interviews of semi-finalists/finalists (\$50/applicant).
- Criminal/financial/educational degree background checks on finalist candidates chosen for interviews (\$125/candidate).

All materials developed in this search shall remain the property of the District.

3. Specific services contracted by the District:

- _____ Phase I
- _____ Phase II
- _____ Phase III
- _____ Phase IV
- _____ Phase V

Total Fee for The Contracted Services \$ _____

THE NOT TO EXCEED AMOUNT IS \$ _____
(per the parameters on page ____ of the proposal)

4. Payment. Payment of the fees and expenses shall be as follows:

- (a) One-half (1/2) of the contracted fee referenced in Section 3 above shall be due and owing upon the execution of this Agreement;
- (b) All advertising/media expenses will be due and owing when the candidates are presented to the District for consideration; and
- (c) One-half (1/2) of the fee referenced in Section 3 above shall be due and owing, plus all remaining expenses shall be due and owing, upon the completion of the services by Consultant, in no event later than sixty (60) days after receipt of invoice. All amounts not timely paid shall bear interest at a rate of ten percent (10%) per annum. Consultant reserves the right to suspend the performance of services during any period of delinquency.

5. Additional Terms and Conditions. By signing below, the parties also agree to the following additional terms and conditions:

The Consultant reserves the right to use third-party services to conduct reference/background/criminal/degree verification checks on candidates. Consultant makes no guarantee as to the accuracy or completeness of any checks that are conducted, whether directly by Consultant or through a third-party service.

Neither party shall have the authority to enter into agreements of any kind on behalf of the other party, and neither party shall have the power or authority to bind or obligate the other party in any manner whatsoever. This Agreement is intended solely for the benefit of the parties, and it is not intended to confer third-party beneficiary rights upon any other person.

The provisions of this Agreement shall be interpreted and construed in accordance with their fair meanings and shall not be strictly construed for or against either party, regardless of which party may have drafted this Agreement or any specific provision herein.

Each party represents that it has full power and authority to enter into and perform this Agreement, and the person executing this Agreement has been properly authorized and empowered to take such action. Each party further acknowledges that it has read this Agreement, understands it and agrees to be bound by its terms.

Regardless of the basis on which District may be entitled to claim damages from Consultant (including breach of contract, negligence, misrepresentation, or any other contract or tort claim), Consultant's liability, if any, will in the aggregate for all claims, causes of action or damages, be limited to any actual direct damages incurred by the District, subject in all events to a maximum of the total fees (but not expenses) paid by the District to Consultant hereunder. Under no circumstances shall Consultant be liable for special, punitive, incidental or indirect damages or for any consequential damages (including lost profits, loss of business, revenue or goodwill, or loss of anticipated savings), even if informed of the possibility.

CONSULTANT MAKES NO EXPRESS OR IMPLIED REPRESENTATION OR WARRANTY REGARDING ANY OF THE CANDIDATES SUBMITTED TO THE DISTRICT FOR CONSIDERATION HEREUNDER, INCLUDING, WITHOUT LIMITATION, ANY REPRESENTATION OR WARRANTY RELATING TO QUALITY, LIKELIHOOD OF SUCCESS, FITNESS, PERFORMANCE OR FITNESS FOR ANY PARTICULAR PURPOSE.

No failure or delay in the exercise of any right, power, or privilege shall operate as a waiver of such right, power, or privilege. No waiver of any default on one occasion shall constitute a waiver of any subsequent or other default. No single or partial exercise of a right, power, or privilege shall preclude the further or full exercise thereof.

The provisions of this Agreement shall be deemed severable and the invalidity or unenforceability of any of its provisions shall not affect the validity and enforceability of any other provisions and the rest of this Agreement shall continue in effect to the fullest extent possible.

This Agreement shall be governed by and shall be construed, interpreted, and enforced in accordance with the substantive laws of the State of Nebraska, without reference to principles of conflicts of law. All disputes arising out of or relating to this Agreement, or the breach or default of this Agreement, shall be determined solely by a state or federal court located in or whose jurisdiction includes Omaha, Douglas County, Nebraska. EACH PARTY HEREBY WAIVES ITS RIGHT TO A JURY TRIAL FOR ALL CLAIMS, INCLUDING COUNTERCLAIMS AND TORT CLAIMS, WHICH IN ANY WAY RELATE TO THE SUBJECT MATTER OF THIS AGREEMENT.

This Agreement is binding on the parties hereto and shall inure to the benefit of the parties and their respective successors, assigns, except District may not assign or transfer its rights or obligations hereunder without the express prior written consent of the Consultant.

This Agreement contains the entire agreement among the parties hereto with respect to its subject matter and supersedes all prior agreements, understandings, inducements or conditions, express or implied, oral or written, and any course of dealing or usage of the trade inconsistent with its terms. This Agreement may not be modified or amended except by a written amendment signed by both parties. No terms that are additional to or different from the terms of this agreement (including, without limitation, the terms of an invoice, acceptance, or acknowledgment of the District) shall be binding on either party hereto.

In witness whereof, the parties have signed and entered into this Agreement as of the date set forth below.

_____ (“District”)

By: _____
Its: Authorized Representative

Date

McPherson & Jacobson, L.L.C.
 (“Consultant”)

By: _____
Its: Authorized Representative

Date

Selected References

Oconomowoc Area School District

915 E. Summit Avenue
Oconomowoc WI 53066
School Phone: 262-560-1115
Board Contact: James Wood 262-617-9876
Search Year: 2021/22
Enrollment: 5,300

Chippewa Falls Area Unified School District

1130 Miles Street
Chippewa Falls WI 54729-1923
School Phone: 715-726-2417
School District Contact: Peggy McKillip
Board Contact: David Czec 715-456-4097
Search Year: 2019/20
Enrollment: 5,100

West Bend School District

735 South Main St.
West Bend WI 53095
School Phone: 262-306-4800
School District Contact: David Hammelman
Board Contact: Joel Ongert
Search Year: 2017/18
Enrollment: 6,909

Columbus School District

200 West School Street
Columbus WI 53925
School Phone: 920-623-5950
School District Contact: Tania Black 920-623-5950
Board Contact: Julie Hajewski
Search Year: 2021/22
Enrollment: ,1360

Additional Information

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

On Jun 28, 2020, at 2:58 PM, Sharon McIlquham <mcilqus1@chipfalls.org> wrote:

Mr. Jacobson:

I just wanted to take a moment to tell you how satisfied I was with the services provided by McPherson and Jacobson throughout our recent superintendent search for the Chippewa Falls Area Unified School District. I was incredibly impressed with Brian Hanes and Damian LaCroix, and the assistance they offered us with our process. They were both professional and spot on with their assessments of the candidates. Their input was valuable and objective. They readily answered any questions and provided invaluable assistance. The reference checks were thorough and their perspective offered on the candidates presented to the school board was accurate and insightful. I truly can't imagine going through this process without the assistance of McPherson and Jacobson. It was a true pleasure working with your company throughout the process. Thank you for hiring such wonderful employees!!

Sharon McIlquham
CFAUSD Board Member

From: Mark White <mwhite@lacrossesd.org>
Sent: Friday, May 15, 2020 9:45 AM
To: Gary McAndrew <gary@mcmsearchgroup.com>
Subject: Re: Request

The School District of La Crosse engaged the services of McPherson and Jacobson to assist with the hiring of a new Superintendent of Schools in December of 2019 and completed the search in March, 2020 with the successful hiring of a new Superintendent of Schools.

As the HR Director for the School District of La Crosse I served as the district liaison for the search. I found both the company and our search coordinator to be organized, ethical, and skilled. Communications were clear and timelines followed. McPherson and Jacobson presented a preferred organization and timeline for the search and adapted their normal procedures for the specific needs of our district. Our search was highly successful and the experience with McPherson and Jacobson was a very positive one.

Mark J. White
Director of Human Resources
School District of La Crosse, WI
608-789-7650
[NAESP President 2014-2015](#)



915 E. Summit Avenue • Oconomowoc, WI 53066
www.oasd.org

February 21, 2022

During the early fall of 2021 the Oconomowoc Area School District engaged in the process of finding a search firm that could help secure our next Superintendent of Schools. As a Board we chose McPherson and Jacobson to help us find our new district leader, and we could not have been more pleased with the service that we received.

Our two recruiters from McPherson and Jacobson were outstanding! Brian Hanes and Vance Dalzin became trusted colleagues with our board. You could not find two more professional and insightful people to help lead such a critical search. They were able to help guide us through all phases of the search process and be a valuable resource when we as a board were coming to terms with the qualities that we were looking for in our next district leader.

During our final deliberations to select a candidate Brian and Vance were able to offer a candid appraisal of the candidates and help affirm the decision that we as a board made in the selection of our next Superintendent of Schools.

I can whole-heartedly say that contracting with McPherson and Jacobson was the best decision that the Oconomowoc Area School District Board of Education made when we were looking for a search firm that fit our needs. I offer McPherson and Jacobson my highest recommendation, secured in the knowledge that their firm will perform in a first-rate fashion one hundred percent of the time.

Sincerely,

A handwritten signature in black ink that reads "Chad E. Schraufnagel".

Chad E. Schraufnagel
Board Member
Oconomowoc Area School District

Declaracion de Traducción: Estamos trabajando diligentemente para traducir nuestros documentos al español. Por favor comuníquese con la escuela de su hijo para aclaración. Si todavía necesitas aclaración, por favor comuníquese con Translate@oasd.org.

Nondiscrimination: The Oconomowoc Area School District provides assurance that no student is discriminated against because of the student's sex, race, color, religion, national origin, ancestry, creed, pregnancy, marital or parental status, sexual orientation, or physical, mental, emotional, or learning disability.



Columbus School District

200 W. School Street | Columbus, Wisconsin 53925 | (920) 623-5950

Columbus High School
1164 Farnham Street

Columbus Middle
400 S. Dickason Boulevard

Columbus Elementary/Discovery Charter
200 Fuller Street

November 14, 2022

Letter of Reference

McPherson and Jacobson – Superintendent Search

The Columbus School District is pleased to recommend McPherson and Jacobson, LLC, for Superintendent Search services. The Columbus School District engaged McPherson and Jacobson for a successful Superintendent Search in Spring 2022. The district had the pleasure of working with consultants Dr. Vance Dalzin and Kristen Taylor. Their attention to detail and support throughout the process was outstanding. As Board President, they made themselves available to me throughout the process at any time, day or evening, as needed. True to their proposal, they offered a comprehensive search process that included extensive recruitment of potential candidates, meaningful engagement of all district stakeholders, aesthetically pleasing and accurate promotional materials, and a proven selection process that resulted in the identification of our next superintendent candidate that met all identified needs. The Columbus School District would not hesitate to recommend McPherson and Jacobson for a districts' superintendent search.

Sincerely,

Julie Hajewski, Board President

Columbus School District

The Board of the Columbus School District does not discriminate on the basis of sex in its education program or activity and is required by Title IX and its implementing regulations not to discriminate in such a manner. The requirement not to discriminate in its education program or activity extends to admission and employment. The District's Title IX Coordinator is: Lisa Blochwitz, Director of Student Services, (920) 623-5950, 200 W. School Street, Columbus WI 53925. lblochwitz@columbus.k12.wi.us

Any inquiries about the application of Title IX and its implementing regulations to the District may be referred to the Title IX Coordinator(s), the Assistant Secretary for the U.S. Department of Education's Office for Civil Rights, or both.

The Board has adopted a grievance process and procedures that provide for the prompt and equitable resolution of student and employee complaints alleging any action that is prohibited by Title IX and/or its implementing regulations. The grievance process and procedures are included in Policy 2266 – Nondiscrimination on the Basis of Sex in Education Programs or Activities, which is available at: <https://go.boarddocs.com/wi/cbus/Board.nsf/public?open>. The grievance process and procedures specifically address how to report or file a complaint of sex discrimination, how to report or file a formal complaint of Sexual Harassment, and how the District will respond.

WCSD - New Heritage Elementary School
Masonry - Bid Tabulation

Company	JP Cullen	Walsh Masonry	Cornerstone	Kinateder Masonry	Crowley Masonry	Job Spread	Difference
Date	23-May	23-May	23-May	23-May	23-May		
Contact	Stephanie Schuette	Bryant Ebert	Jeff Staver	Mike Kinateder	Brent Crowley		
Phone #	608.757.6767	920.261.8580	608.758.4005	414.573.0694	608.835.5660		
BID	\$ 2,347,585	\$ 2,448,510	NO BID	NO BID	NO BID	\$ 2,400,000	\$ -
	\$ -	\$ -	\$ -			\$ -	\$ -
			\$ -			\$ -	\$ - 109
Winter Conditions (Allowance)	\$ 40,000	\$ 40,000	\$ -			\$ -	\$ -
CONTRACT TOTAL	\$ 2,387,585	\$ 2,488,510	\$ -			\$ 2,400,000	\$ 12,415