

A Proposal Prepared for

San Mateo-Foster City School District

Foster City, California

for

*The Search and Selection of a
Superintendent of Schools*

submitted in collaboration with



by

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



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



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February 10, 2021

Board of Education
San Mateo-Foster City School District
1170 Chess Drive
Foster City, California 94404

Thank you for the opportunity to respond to your RFP. The enclosed proposal describes the professional services the California School Board Association representative, McPherson & Jacobson, L.L.C. will provide San Mateo-Foster City 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 be 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 diversity 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 in the field. 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.

McPherson & Jacobson has been conducting searches for boards of education since 1991. Our California consultants will ensure your search results in quality leadership for your district.

Our contact information:

California School Boards Association
Attn: Nicole Delos Reyes
3251 Beacon Blvd.
West Sacramento, CA 95691
888-375-4814
Email: mail@macnjake.com

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

Sincerely,

A handwritten signature in blue ink, appearing to read 'Thomas Jacobson', with a stylized flourish at the end.

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

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02/21

The McPherson & Jacobson Difference

“It’s About the Kids”

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

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

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

History and Description of Firm

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

California School Board Association Search Service

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

Leading National Search Firm

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 815 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 110 consultants** across the nation. Almost one-fourth of McPherson & Jacobson consultants are minorities or female. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensures your search results in quality leadership for education excellence.

Sustainability in Leadership

Waters and Marzano 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, **seventy percent** of administrators are in the position for which they were hired. **Over fifty percent** of administrators are still in the position for which they were hired within the past ten years. **Forty percent** of the administrators selected by governing boards within the past 15 years continue in the position for which they were hired.

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

Albany Unified School District, Berkeley

Search Year: 2018/19, Enrollment: 3,714

Alisal Union School District, Salinas

Search Year: 2019/20, Enrollment: 9,000

Alpine Union School District, Alpine

Search Year: 2015/16, Enrollment: 1,700

Anderson Union High School District, Anderson

Search Year: 2018/19, Enrollment: 1,800

Benicia Unified School District, Benicia

Search Year: 2014/15, Enrollment: 5,000

Calexico Unified School District, Calexico

Search Year: 2017/18, Enrollment: 8,966

Cold Spring School District, Santa Barbara

Search Year: 2016/17, Enrollment: 175

Conejo Valley Unified School District, Thousand Oaks

Search Year: 2014/15, Enrollment: 19,500

Denair Unified School District, Denair

Search Year: 2017/18, Enrollment: 1,500

El Monte Union High School District, El Monte

Search Year: 2014/15, Enrollment: 9,500

Elk Grove Unified School District, Elk Grove

Search Year: 2014/15, Enrollment: 62,000

Fallbrook Union High School District, Fallbrook

Search Year: 2018/19, Enrollment: 2,200

Fort Sage Unified School District, Herlong

Search Year: 2016/17, Enrollment: 180

Glendale Unified School District, Glendale

Search Year: 2014/15, Enrollment: 26,200

Golden Valley Unified School District, Madera

Search Year: 2017/18, Enrollment: 1,950

Grass Valley School District, Grass Valley

Search Year: 2019/20, Enrollment: 1,500

Gustine Unified School District, Gustine

Search Year: 2014/15, Enrollment: 1,830

Hacienda La Puente Unified School District, City of Industry
Search Year: 2019/20, Enrollment: 22,000

Hemet Unified School District, Hemet,
Search Year: 2015/16, Enrollment: 21,000

Johnstonville Elementary School District, Susanville
Search Year: 2015/16, Enrollment: 205

Lakeside Union School District, Bakersfield
Search Year: 2014/15, Enrollment: 1,310

Nevada Joint Union High School District, Grass Valley
Search Year: 2017/18, Enrollment: 2,600

New Haven Unified School District, Union City
Search Year: 2018/19, Enrollment: 12,148

Newark Unified School District, Newark
Search Year: 2019/20, Enrollment: 5,700

Newcastle Elementary School District, Newcastle
Search Year: 2014/15, Enrollment: 796

Old Adobe Union School District, Petaluma
Search Year: 2019/20, Enrollment: 2,097

Oxnard Union High School District, Oxnard
Search Year: 2019/20, Enrollment: 16,800

Parlier Unified School District, Parlier
Search Year: 2019/20, Enrollment: 3,500

Paso Robles Joint Unified School District, Paso Robles
Search Year: 2013/14, Enrollment: 6,500

Penn Valley Union Elementary School District, Penn Valley
Search Year: 2014/15, Enrollment: 700

Piner-Olivet Union School District, Santa Rosa
Search Year: 2019/20, Enrollment: 1,300

Pollock Pines Elementary School District, Pollock Pines
Search Year: 2015/16, Enrollment: 800

Red Bluff Joint Union High School District, Red Bluff
Search Year: 2013/14, Enrollment: 1,622

Richland School District, Shafter
Search Year: 2015/16, Enrollment: 3,504

Roseville Joint Union High School District, Roseville
Search Year: 2017/18, Enrollment: 10,300

San Carlos School District, San Carlos
Search Year: 2020/21, Enrollment: 2,900

Santa Barbara Unified School District, Santa Barbara

Search Year: 2019/20, Enrollment: 15,000

Saugus Union School District, Santa Clarita

Search Year: 2017/18, Enrollment: 10,000

Sausalito Marin City School District, Marin City

Search Year: 2015/16, Enrollment: 524

Sierra-Plumas Unified School District/Sierra County Office of Education, Loyalton

Search Year: 2018/19, Enrollment: 386

Soledad Unified School District, Soledad

Search Year: 2016/17, Enrollment: 4,800

Sonoma Valley Unified School District, Sonoma

Search Year: 2020/21, Enrollment: 3,730

Sonora Union High School District, Sonora

Search Year: 2019/20, Enrollment: 1,000

Strathmore Union Elementary School District, Strathmore

Search Year: 2019/20, Enrollment: 773

Vallejo City Unified School District, Vallejo

Search Year: 2020/21, Enrollment: 11,500

Ventura Unified School District, Ventura

Search Year: 2016/17, Enrollment: 17,000

Washington Unified School District, West Sacramento

Search Year: 2020/21, Enrollment: 7,460

Winship-Robbins Elementary School District, Meridian

Search Year: 2013/14, Enrollment: 200

McPherson & Jacobson's Past Five Years of Searches

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

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u><i>Alaska</i></u>			
Valdez City Schools	Valdez	2017/18	650
<u><i>Arizona</i></u>			
Mesa Public Schools	Mesa	2019/20	64,000
Tucson Unified School District--General Counsel	Tucson	2015/16	48,000
Tucson Unified School District--Internal Auditor Position	Tucson	2016/17	48,000
Peoria Unified School District #11	Glendale	2017/18	37,000
Dysart Unified School District	Surprise	2017/18	25,000
Kyrene Elementary School District No. 28	Tempe	2015/16	18,000
Liberty Elementary School District	Buckeye	2017/18	3,500
Salt River Schools--Director of Human Resources	Scottsdale	2017/18	1,000
<u><i>Arkansas</i></u>			
Conway Public Schools	Conway	2019/20	10,117
Marion School District	Marion	2016/17	4,113
Pine Bluff School District	Pine Bluff	2015/16	4,000
Batesville School District	Batesville	2016/17	3,372
Harrison School District	Harrison	2016/17	2,800
Star City School District	Star City	2015/16	1,645
Heber Springs School District	Heber Springs	2019/20	1,600
Highland School District	Hardy	2016/17	1,571
DeWitt School District	DeWitt	2017/18	1,335
Fountain Lake School District	Hot Springs	2015/16	1,300
Riverview School District	Searcy	2019/20	1,200
McGehee Public Schools	McGehee	2016/17	1,186
Smackover-Norphlet School District	Smackover	2018/19	1,150
Mayflower School District	Mayflower	2019/20	1,100
Newport School District	Newport	2018/19	1,100
Valley Springs School District	Valley Springs	2019/20	866
Cedar Ridge School District	Newark	2019/20	705
Gurdon Public School District	Gurdon	2019/20	684

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>Arkansas (continued)</u>			
McCrory School District	McCrory	2018/19	665
East End School District	Bigelow	2017/18	650
Foreman School District	Foreman	2017/18	509
Concord School District	Concord	2018/19	440
<u>California</u>			
Glendale Unified School District	Glendale	2015/16	26,200
Hacienda La Puente Unified School District	City of Industry	2019/20	22,000
Hemet Unified School District	Hemet	2015/16	21,000
Ventura Unified School District	Ventura	2016/17	17,000
Oxnard Union High School District	Oxnard	2019/20	16,800
Santa Barbara Unified School District	Santa Barbara	2019/20	15,000
New Haven Unified School District	Union City	2018/19	12,000
Roseville Joint Union High School District	Roseville	2017/18	10,300
Berkeley Unified School District--Executive Director for Special Education	Berkeley	2017/18	10,000
Saugus Union School District	Santa Clarita	2017/18	10,000
Alisal Union School District	Salinas	2019/20	9,000
Calexico Unified School District	Calexico	2017/18	8,966
Newark Unified School District	Newark	2019/20	5,700
Soledad Unified School District	Soledad	2016/17	4,870
Albany Unified School District	Albany	2018/19	3,714
Richland School District	Shafter	2016/17	3,504
Parlier Unified School District	Parlier	2019/20	3,500
Nevada Joint Union High School District	Grass Valley	2017/18	2,600
Golden Valley Unified School District	Madera	2017/18	1,950
Old Adobe Union School District	Petaluma	2019/20	1,950
Alpine Union School District	Alpine	2015/16	1,700
Compass Charter Schools (formerly Academy of Arts & Sciences)--CEO Search	Thousand Oaks	2015/16	1,600
Denair Unified School District	Denair	2017/18	1,500
Grass Valley Elementary School District	Grass Valley	2019/20	1,500
Piner-Olivet Union School District	Santa Rosa	2019/20	1,300
Sonora Union High School District	Sonora	2019/20	940
Pollock Pines Elementary School District	Pollock Pines	2015/16	800
Strathmore Union Elementary School District	Strathmore	2019/20	773
Sausalito Marin City School District	Marin City	2015/16	524
Sierra-Plumas Joint Unified School District/Sierra County Office of Education	Loyalton	2018/19	425

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>California (continued)</u>			
Fort Sage Unified School District	Herlong	2017/18	251
Oasis Charter Public School--Executive Director	Salinas	2018/19	250
Johnstonville Elementary School District	Susanville	2016/17	212
Cold Spring School District	Santa Barbara	2016/17	175
<u>Colorado</u>			
Colorado Association of School Executives (CASE)--Executive Director	Denver	2019/20	
Thompson School District R2-J	Loveland	2017/18	16,000
Summit School District RE-1	Frisco	2019/20	3,450
Morgan County School District	Fort Morgan	2017/18	3,300
Archuleta School District 50JT	Pagosa Springs	2019/20	1,700
Clear Creek School District RE-1	Idaho Springs	2018/19	765
<u>Georgia</u>			
Fulton County Schools	Atlanta	2018/19	93,500
Troup County School System	La Grange	2018/19	12,300
<u>Idaho</u>			
Coeur d'Alene Public Schools	Coeur d'Alene	2016/17	11,000
Lake Pend Oreille School District	Ponderay	2018/19	3,500
<u>Illinois</u>			
Sigma Alpha Epsilon Fraternity--Chief Executive Officer	Evanston	2019/20	
Rock Island-Milan School District #41--Elementary School Principal	Rock Island	2018/19	6,300
East Dubuque School District #119	East Dubuque	2017/18	700
Stockton School District 206	Stockton	2019/20	660
<u>Iowa</u>			
Marshalltown Community School District	Marshalltown	2015/16	5,085
Muscatine Community School District	Muscatine	2019/20	4,820
Ottumwa Community School District	Ottumwa	2015/16	4,595
Marion Independent School District	Marion	2018/19	1,932
Webster City Community Schools	Webster City	2017/18	1,800
Vinton-Shellsburg Community Schools	Vinton	2019/20	1,675
Center Point-Urbana Community School District	Center Point	2015/16	1,543

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>Iowa (continued)</u>			
West Liberty Community School District	West Liberty	2016/17	1,307
Cedar Rapids Community School District-- High School Principal	Cedar Rapids	2016/17	1,300
Clear Lake Community School District	Clear Lake	2015/16	1,200
Monticello Community School District	Monticello	2015/16	1,096
Eddyville-Blakesburg-Fremont Community School District	Eddyville	2019/20	1,034
West Burlington Independent School District	West Burlington	2018/19	1,000
West Monona CSD/West Harrison CSD (shared supt)	Onawa / Mondamin	2019/20	981
Sibley-Ocheyedan Community School District	Sibley	2018/19	850
West Branch Community School District	West Branch	2017/18	844
Belmond-Klemme Community School District	Belmond	2015/16	801
MMCRU Schools (Marcus Meridian Cleghorn Remsen Union)	Marcus	2017/18	800
North Cedar Community School District	Stanwood	2015/16	800
North Kossuth CSD & North Union CSD (shared supt)	Swea City/Armstrong	2015/16	743
Ogden Community School District	Ogden	2017/18	700
Sioux Central Community School District	Sioux Rapids	2019/20	667
AGWSR Community Schools	Ackley	2017/18	624
<u>Kansas</u>			
Lansing Unified School District 469	Lansing	2015/16	2,600
Ottawa USD 290	Ottawa	2017/18	2,386
Piper USD 203	Kansas City	2019/20	2,314
Chapman USD 473	Chapman	2015/16	1,065
Burlington USD 244	Burlington	2015/16	854
Wellsville USD 289	Wellsville	2017/18	782
Lyndon USD 421	Lyndon	2016/17	400
Stafford USD 349	Stafford	2016/17	200
<u>Mississippi</u>			
Jackson Public Schools	Jackson	2017/18	27,062
Madison County School District	Ridgeland	2017/18	13,225
Gulfport School District--Principal--Middle School	Gulfport	2018/19	5,500
Starkville Oktibbeha Consolidated School District	Starkville	2016/17	5,200

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>Missouri</u>			
Hazelwood School District--Director of Finance	Florissant	2018/19	18,000
Lee's Summit R-7 School District	Lee's Summit	2019/20	18,000
Francis Howell School District	Saint Charles	2015/16	17,000
Webster Groves School District	Webster Groves	2015/16	4,500
Willard Public Schools	Willard	2016/17	4,500
<u>Montana</u>			
Shepherd School District #37	Shepherd	2016/17	750
<u>Nebraska</u>			
Learning Community of Douglas and Sarpy Counties--Chief Executive Officer	Omaha	2015/16	
Grand Island Public Schools	Grand Island	2015/16	9,607
Hastings Public Schools	Hastings	2018/19	3,740
Waverly School District 145	Waverly	2016/17	1,920
Crete Public Schools	Crete	2015/16	1,800
Seward Public Schools	Seward	2016/17	1,406
South Central Nebraska Unified #5	Fairfield	2017/18	681
Arlington Public Schools	Arlington	2018/19	660
Chase County Schools	Imperial	2017/18	620
Gibbon Public Schools	Gibbon	2016/17	598
Palmyra Bennet District OR-1 Schools	Palmyra	2019/20	581
Centura Public Schools	Cairo	2017/18	486
Doniphan-Trumbull Public School	Doniphan	2017/18	465
Superior Public Schools	Superior	2017/18	435
Southern Public Schools	Wymore	2016/17	395
Shelton Public Schools	Shelton	2019/20	300
Pawnee City Public Schools	Pawnee City	2015/16	297
Axtell Community School	Axtell	2016/17	264
<u>New Hampshire</u>			
Manchester School District	Manchester	2018/19	13,803
<u>New Mexico</u>			
Carlsbad Municipal Schools	Carlsbad	2016/17	6,410

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>North Carolina</u>			
Charlotte-Mecklenburg Schools	Charlotte	2015/16	145,363
Dare County Schools	Nags Head	2016/17	5,500
<u>Ohio</u>			
Indian Hill Exempted Village School District	Cincinnati	2018/19	2,000
<u>Oregon</u>			
Reynolds School District	Fairview	2017/18	11,200
Springfield Public Schools	Springfield	2018/19	10,700
North Wasco County School District 21	The Dalles	2019/20	3,000
North Bend School District	North Bend	2018/19	2,300
<u>Pennsylvania</u>			
North Allegheny School District	Pittsburgh	2019/20	8,500
Fox Chapel Area School District	Pittsburgh	2019/20	4,027
<u>South Carolina</u>			
Jasper County School District	Ridgeland	2015/16	3,000
<u>South Dakota</u>			
Rapid City Area School District 51-4	Rapid City	2015/16	13,320
Harrisburg School District	Harrisburg	2018/19	4,700
Sisseton School District 54-2	Sisseton	2016/17	925
<u>Tennessee</u>			
Tennessee Public Charter School Commission--Executive Director	Nashville	2019/20	
Tennessee--State Turnaround Superintendent	Nashville	2019/20	
<u>Utah</u>			
Park City School District--Chief Academic Officer	Park City	2018/19	4,700
Park City School District--Chief Operations Officer	Park City	2018/19	4,700
Park City School District--Director of Talent Management	Park City	2018/19	4,700
<u>Vermont</u>			
Burlington School District	Burlington	2019/20	4,200

<u>District</u>	<u>City</u>	<u>Year</u>	<u>Enrollment</u>
<u>Virginia</u>			
Norfolk Public Schools	Norfolk	2019/20	30,000
Roanoke City Public Schools	Roanoke	2019/20	14,000
<u>Washington</u>			
WSSDA--Executive Director	Olympia	2015/16	
Clover Park School District	Lakewood	2018/19	12,885
Othello School District No. 147	Othello	2015/16	4,000
Ellensburg School District #401	Ellensburg	2017/18	3,300
Tukwila School District	Tukwila	2018/19	2,934
Blaine School District	Blaine	2018/19	2,200
Port Townsend School District	Port Townsend	2015/16	1,214
Mabton School District	Mabton	2017/18	1,000
Coupeville School District	Coupeville	2017/18	980
Chewelah School District	Chewelah	2017/18	815
Quilcene School District	Quilcene	2017/18	650
Kittitas School District	Kittitas	2016/17	600
Ocosta School District	Westport	2016/17	600
Mossyrock School District	Mossyrock	2015/16	530
Soap Lake School District #156	Soap Lake	2017/18	490
McCleary School District	McCleary	2017/18	325
Crescent School District	Joyce	2015/16	250
Thorp School District	Thorp	2017/18	170
Quileute Tribal School	La Push	2019/20	120
North River School District	Cosmopolis	2019/20	67
Skykomish School District	Skykomish	2015/16	45
<u>Wisconsin</u>			
School District of La Crosse	La Crosse	2019/20	6,500
West Bend School District	West Bend	2019/20	6,300
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
Cedar Grove-Belgium School District	Cedar Grove	2019/20	1,350
Bristol School District No. 1	Bristol	2015/16	770

Current Searches

District	School city	School state	Enrollment	Closes
Alamosa School District, No. RE-11J	Alamosa	CO	2,500	3/15/21
Alpena School District	Alpena	AR	480	Closed
Arickaree School District R-2	Anton	CO	120	TBD
Champlain Valley School District	Shelburne	VT	4,000	3/1/21
Cheyenne Mountain School District 12	Colorado Springs	CO	5,000	Closed
Doniphan-Trumbull Public School	Doniphan	NE	426	Closed
Elbert County School District C-2	Kiowa	CO	270	3/22/21
Haxtun RE-2J School District	Haxtun	CO	350	3/10/21
Ignacio School District 11-JT	Ignacio	CO	720	Closed
Lamar School District RE-2	Lamar	CO	1,614	Closed
Montezuma-Cortez School District RE-1	Cortez	CO	2,800	3/15/21
Morgan County School District	Fort Morgan	CO	3,300	Closed
Norwood School District	Norwood	CO	206	Closed
Riverhead Central School District	Riverhead	NY	5,600	3/4/21
San Carlos School District	San Carlos	CA	2,900	TBD
Sangre de Cristo School District	Mosca	CO	250	3/2/21
Searcy School District	Searcy	AR	4,000	3/1/21
Shelton School District	Shelton	WA	4,200	2/25/21
Sonoma Valley Unified School District	Sonoma	CA	3,730	3/25/21
Summerland Public Schools	Ewing	NE	402	Closed
Valdez City Schools	Valdez	AK	686	2/18/21
Vancouver Public Schools	Vancouver	WA	23,400	Closed
Windsor Central Supervisory Union	Woodstock	VT	1,039	Closed

Consultants

Consultants for Search

William Huyett—Lead Consultant

241 River Oaks Drive

Lodi, CA 95240

Email: b_huyett@macnjake.com

Phone: 209-334-3375

Educational Background

Administrative Credential	California State University	
M.A.T.	University of Virginia	Math Education
B.S.	University of Virginia	Mechanical Engineering

Professional Experience

Dates			Title	District	Location	Enrollment
2013	to	Present	Consultant	McPherson & Jacobson, L.L.C.	Omaha, NE	
2008	to	2012	Superintendent	Berkeley Unified School District	Berkeley, CA	9,000
2000	to	2008	Superintendent	Lodi Unified School District	Lodi, CA	30,000
1996	to	2000	Superintendent	Dixon Unified School District	Dixon, CA	4,000
1992	to	1996	Assistant Superintendent for Secondary Education	Elk Grove Unified School District	Elk Grove, CA	60,000
1998	to	1992	H.S. Principal	Elk Grove Unified School District	Elk Grove, CA	1,800
1984	to	1988	H.S. Principal	Elk Grove Unified School District	Elk Grove, CA	1,800
1982	to	1984	M.S. Principal	Elk Grove Unified School District	Elk Grove, CA	1,800

Dates		Title	District	Location	Enrollment
1978	to 1982	H.S. Vice Principal/ Admin. Assistant	Elk Grove Unified School District	Elk Grove, CA	1,800
1974	to 1978	Mathematics & Physics Teacher	Elk Grove Unified School District	Elk Grove, CA	1,800

Professional Organization Memberships

Name of Organization	Offices Held
California High School Task Force	Chair of the Curriculum Committee
Northern California Superintendents Association	Secretary/Treasurer
WASC Advisory Committee	Committee Chair
ACSA Superintendent Academy Faculty	

Nicole M. Anderson
P.O. Box 5475
Vallejo, CA 94591
Email: n_anderson@macnjake.com
Phone: 916-539-7161

Educational Background

B.A.	Oregon State University	Business Administration
M.A.	Sonoma State University (in progress)	Educational Leadership
Credential	National University	Single Subject Teaching
Credential	Sonoma State University	Administrative Services

Professional Experience

Dates			Title	District/Organization	Location
2020	to	Present	Consultant/Partner	Ed Connective	Virginia
2018	to	Present	Consultant	McPherson & Jacobson, L.L.C.	Omaha, NE
2018	to	Present	Consultant	California School Boards Association	West Sacramento, CA
2018	to	Present	Consultant	Association of California School Administrators (ACSA)	Sacramento, CA
2018	to	Present	Consultant	Epoch Education	Sonoma, CA
2018	to	Present	Substitute Administrator	Vallejo City Unified School District	Vallejo, CA
2018	to	Present	Consultant	Multiple K-12 and college educational agencies, non-profits, school boards, police departments, etc.	California
2018	to	2020	Consultant	Generation Ready	New York, NY
2016	to	Present	Founder, CEO	Nicole Anderson and Associates Consulting, LLC	Vallejo, CA
2014	to	2017	Diversity & Equal Access Executive	Association of California School Administrators	Sacramento, CA
2011	to	2014	Principal	Highland Elementary School	Vallejo, CA
2009	to	2011	Vice Principal	Vallejo High School	Vallejo, CA
2009	to	2018	Adjunct Professor	Touro University	Vallejo, CA
2004	to	2009	Dean/Assistant Principal	Vallejo High School	Vallejo, CA
2004	to	2006	Summer High School Principal	Jesse M. Bethel High School	Vallejo, CA
1998	to	2004	Spanish, Leadership Teacher	Jesse M. Bethel High School (Grandfather's namesake)	Vallejo, CA
1993	to	1998	Scholarship Basketball Player	Oregon State University	Corvallis, OR

Community/Service/Fraternal Organizations

Name of Organization	Offices/Positions Held
Ralph “Tony” Gross 4 Vallejo School Board	Campaign Manager
Benicia African American Moms	Coordinator
Benicia Education Foundation	Secretary
Solano County Equity Collaborative	Member
Benicia Middle School Site Council	Member
Benicia Unified Facilities Planning Team	Member
Benicia Middle School PBIS Team	Member
Benicia Middle/Mathew Turner Elementary PTA	Member
ACSA Equity Committee	Chair
ACSA Ed Cal Newsletter and Leadership Magazine	Featured author
ACSA Federal Legislative Advocacy Team	CA State Leader Representative
California Equity Leadership Alliance	Coordinator
Humboldt County Office of Education	Featured Speaker/Keynote
California Association for Bilingual Education	Featured Speaker
Jesse M. Bethel High School	Head Varsity Girls Basketball Coach
California School Boards Association	Featured Author/Keynote/Equity Network Facilitator
Chevron	Featured Speaker/Keynote
Center for Leadership, Equity, and Research (CLEAR)	Mentor
ACSA Mentoring Program	Mentor
San Mateo County School Boards Association	Facilitator
Northern California Safe & Healthy Conference	Featured Speaker
Sunnyvale, Newark, and ICEF School Districts	Keynote/Featured Speaker

California Consultants

Dr. Derwin “Darryl” Adams, Educational Consultant, Alta Loma
Mrs. Janice Adams, Retired Superintendent, Benicia
Mrs. Nicole Anderson, Educational Consultant, Vallejo
Mr. James Bates, Retired Superintendent, Bakersfield
Ms. Aida Buelna, Retired Superintendent, Woodland
Mr. Robert Ferguson, Retired Superintendent, Napa
Mr. William Huyett, Retired Superintendent, Lodi
Mr. Benjamin “Ben” Johnson II, Former Board Member, Riverside
Dr. Barry Kayrell, Retired Superintendent, Murrieta
Dr. Debbra Lindo, Retired Superintendent, Escondido
Dr. Steven Lowder, Retired Superintendent, Stockton
Dr. Michael McCoy, Retired Superintendent, Bakersfield
Mr. Jesse Modesto, Retired Administrator, Woodland
Dr. Daniel Moirao, Retired Superintendent, Danville
Dr. Stanley Munro, Administrator, Fresno USD, Clovis
Mr. Dennis Murray, Retired Superintendent, Murrieta
Dr. Marilyn Shepherd, Retired Superintendent, Friant
Mr. Edward Velasquez, Retired Superintendent, Chino
Ms. Teri Vigil, Board Member, Falls River Joint Unified School Dist., McArthur
Mr. Daniel Zeisler, Retired Superintendent, Chicago Park ESD, Grass Valley
Dr. Thomas Jacobson, CEO/Owner, McPherson & Jacobson, L.L.C., Omaha, Nebraska
Dr. Steve Joel, National Recruiter, Superintendent, Lincoln, Nebraska

References

New Haven Unified School District

34200 Alvarado-Niles Rd
Union City CA 94587
School Phone: 510-471-1100
School District Contact: Lori Valdes
Board Contact: Sharan Takhar Kaur 510-909-1592
Search Year: 2018/19
Enrollment: 12,000

Santa Barbara Unified School District

720 Santa Barbara Street
Santa Barbara CA 93101
School Phone: 805-963-4338
School District Contact: Sandra Trujillo
Board Contact: Laura Capps 805-245-5465
Search Year: 2019/20
Enrollment: 15,000

Vallejo City Unified School District

665 Walnut Ave.
Vallejo CA 94592
School Phone: 707-556-8921
School District Contact: Gigi Patrick
Board Contact: John Fox 707-548-8870
Search Year: 2020/21
Enrollment: 11,500

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 100 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 900 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 one state school board association 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.

Reasons for Selecting our Firm

- According to the National School Boards Association and the Council of Greater City Schools, the average tenure of superintendents is between 3.2 and 4.2 years. Organizations using the McPherson & Jacobson protocol have enjoyed sustainability of leadership. Over the past five years, 70% of administrators are still in the position for which they were hired. Over 50% of the administrators are still in the position for which they were hired within the past 10 years. Almost 40% of the administrators selected within the past 15 years continue in the position for which they were hired.
- McPherson & Jacobson advocates for a high level of stakeholder involvement during the hiring process while keeping the Board in complete control of the process. When stakeholders are meaningfully involved in the process, and know they have been listened to, they support the Board's decision.
- McPherson & Jacobson has a commitment to work with the Board and the new superintendent during the first year. We work to clarify expectations for the first year and help foster clear communication between the Board and superintendent.

Addressing the Scope of Work

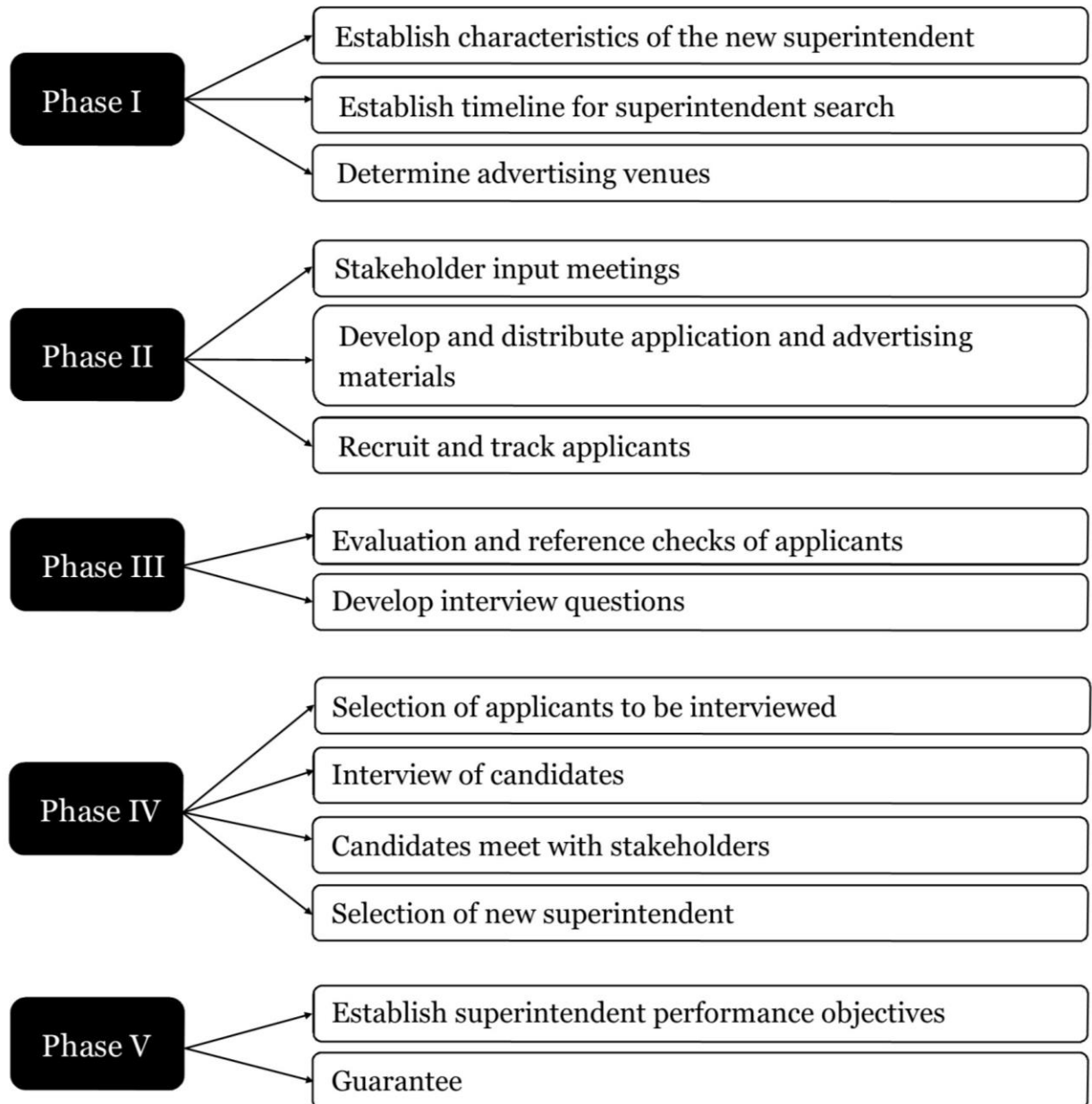
Executive Summary

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

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

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

Five Phases of a Superintendent Search



Phase I

- ✓ **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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

✓ **Confidentiality of Applicants**

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

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

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

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

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

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

Phase III

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

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

✓ **Conduct reference checks.**

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

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

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

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

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

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

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

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

Phase IV

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

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

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

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

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

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

✓ **Coordinate interview and visitation procedures.**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

✓ **Conduct background checks.**

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

Phase V

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

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

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

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

✓ **Provide a guarantee.**

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

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

Timeline

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

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

- At the beginning of the search (**February 2021**)
 - Advertising decisions are made
 - The qualities for the new superintendent are identified
 - Application information is posted
 - A formal timeline is established
 - A brochure is created to advertise the district and the vacancy
- At the time designated by the board (**late February or early March 2021**)
 - 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 March 2021**)
 - 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-April 2021**)
 - Consultants provide information to the board on all applicants who completed the process
 - Consultants present summary profiles of qualified candidates to the board
 - The board selects the candidates it wants to interview
 - McPherson & Jacobson notifies each applicant not selected for an interview
- Soon after the board selects their candidates (**mid to late April 2021**)
 - Semi-finalist interviews are conducted (if chosen by the board)
 - The board interviews its final candidates
 - The board selects their new superintendent
 - A criminal/financial/credential verification background check is conducted on the selected candidate
 - McPherson & Jacobson's consultants contact each candidate who was interviewed to notify them of their status

Responsibilities of San Mateo-Foster City School District and McPherson & Jacobson, L.L.C.

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

Event	McPherson & Jacobson's Tasks
3 rd board meeting	<input type="checkbox"/> The consultant facilitates the board's <ul style="list-style-type: none"> ○ Review of the list of all applicants ○ Overview of candidates on short list ○ Selection of finalists ○ Finalizing of interview dates & schedule ○ Review of interview questions & procedures ○ Finalizing candidate & spouse/significant other arrangements <input type="checkbox"/> Contact finalists and schedule interview dates, review schedule, discuss compensation and contractual issues <input type="checkbox"/> Work with Point of Contact to coordinate interviews (transportation, lodging, interview locations, etc.) <input type="checkbox"/> Send Candidate Daily Interview Schedule to each finalist <input type="checkbox"/> Notify the applicants who were not selected to be interviewed
Interviews	<input type="checkbox"/> Call Point of Contact after 1 st interview to learn how it went <input type="checkbox"/> Call 1 st 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
Finalist selected and accepted	<input type="checkbox"/> Call and make offer to candidate <input type="checkbox"/> Verify acceptance <input type="checkbox"/> Conduct criminal/financial/credential verification check on selected candidate <input type="checkbox"/> Call other finalists <input type="checkbox"/> Sends out letter of congratulations to candidate who was chosen
Phase V	<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

San Mateo-Foster City School District

1 st Board Meeting	<input type="checkbox"/> Provides consultant with the necessary information to create the brochure; the name of the Point of Contact; and the Board Contact List <input type="checkbox"/> Reviews and approves the brochure
During application period	<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
Stakeholder Group Input Meetings are scheduled	<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 Group Input Meetings	<input type="checkbox"/> Link to online stakeholder input form(s) is (are) posted on the school district website
Stakeholder Group Input Meetings completed	<input type="checkbox"/> "Stakeholder Input Report" is posted on the school district website
3 rd board meeting	<input type="checkbox"/> Assist with lodging arrangements and welcome gifts <input type="checkbox"/> Arrange for spouse/significant other tour
Interviews/ Finalist interviews (if board requests semi-finalist interviews)	<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
Meeting to Select Finalist/ Finalist selected and accepted	<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	<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

Initial stakeholder input sessions

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

Meeting the candidates

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

Process for Obtaining Staff Input

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

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

Process for Obtaining Parent and Community Input

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

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

Process for Obtaining Online Stakeholder Input

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

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 venues:

- Four (4) weeks of print advertising in EdCal (40-word ad)
- Sixty (60) days of advertising on EdJoin. .

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 110 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

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 110 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 one state school board association 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 110 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.

Determining Selection Criteria

Using a group process, 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.

By using the criteria developed by the board along with the information gathered from the stakeholders, the consultants can target their recruitment to candidates who will meet the requirements of the district.

Pricing Proposal

The fee for conducting the superintendent search is \$18,500 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 total not to exceed amount including expenses is \$21,700.* (online meetings)

Included in the expenses is

- Four (4) weeks of print advertising in EdCal (40-word ad)
- Sixty (60) days of advertising on EdJoin
- Two (2) days of online stakeholder meetings
- Two online stakeholder input surveys (in English and one additional language)
- Video interviews for five (5) candidates
- Criminal/financial/credential verification background check for the final candidate
- Office expenses

**Travel expenses for the consultants to the district are not included in this amount. If the board requests onsite meetings, McPherson & Jacobson estimates travel costs of \$500 per consultant trip to the district. (Travel costs for two (2) consultants.)*

NOTE:

- Expenses may increase if the district chooses additional media advertising.
- Fees and expenses will increase if the district requests additional stakeholder input days.
- Interview expenses for the candidates are not included in the expenses listed.

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.

Additional Services:

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

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

Additional Information

Transparency—The McPherson & Jacobson Difference

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

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

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

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

...

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

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

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

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

The report will be used to help select a superintendent and will be distributed to the candidates so they can understand the community's needs, said Bob Ferguson, a consultant

for McPherson and Jacobson LLC. The new superintendent also will receive a copy as a guide to taking the helm of the district.

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

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

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

...

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

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

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



Christi Barrett, Ph.D.
Superintendent

Darrin Watters
Deputy Superintendent
Tracy Chambers
Assistant Superintendent
Derek Jindra, Ed.D.
Assistant Superintendent
Jennifer Martin, Ed.D.
Assistant Superintendent

**Professional Development
Service Center**
1791 W. Acacia Avenue
Hemet, CA 92545
(951) 765-5100
Fax: (951) 765-5115

**Professional Development
Academy**
2085 W. Acacia Avenue
Hemet, CA 92545
(951) 765-5100
Fax: (951) 765-6421

Governing Board
Stacey Bailey
Rob Davis
Megan Haley
Gene Hikel
Vic Scavarda
Patrick Searl
Ross Valenzuela

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twitter.com/HemetUnified

August 13, 2020

To Whom It May Concern:

It is my pleasure to write this letter of support for Mr. Ben Johnson. I had the opportunity to work with Mr. Johnson and McPherson and Associates as a candidate for the Superintendent of Hemet Unified School District.

Mr. Johnson provided guidance throughout the application process while working with the District to ensure that the District and I were a good fit. He continued to stay in touch throughout my first year as Superintendent to ensure I had the support needed in my new position.

Mr. Johnson has a kind and caring manner. He is committed to pairing potential candidates with Districts that will grow their skills and expertise as the Superintendent and move the District in a forward direction.

Sincerely,

Christi Barrett, Ph.D.
Superintendent

BOARD OF EDUCATION

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

SUPERINTENDENT

Jeffrey L. Baarstad, Ph.D.



June 3, 2015

To Whom It May Concern:

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

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

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

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

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

A handwritten signature in black ink, appearing to read 'B Connolly', is positioned above the printed name.

Betsy Connolly DVM

Comments from Santa Barbara Unified School District

From: **Laura Capps** <lcapps@sbunified.org>
Date: Wed, Aug 12, 2020 at 1:24 PM
Subject: Re: Follow-up
To: Ben Johnson <benjohnson2nd@gmail.com>

We are thrilled with the new Superintendent that MacPherson & Jacobson found for us. I thoroughly enjoyed working closely with Ben Johnson. He is especially skilled at helping school boards work together and effectively find consensus -- and that is so important in the final weeks of a high stakes search. I am grateful for their partnership.

From: Wendy Sims-Moten <wsimsmoten@sbunified.org>
Date: August 13, 2020 at 12:41:34 PM PDT
To: Ben Johnson <benjohnson2nd@gmail.com>
Subject: Re: Request

From the very beginning of the search firm selection process I appreciated Ben for really laying a foundation that the Board makes the decision. This was very evident throughout the entire process. Whenever we got stuck or were hesitate [sic] to speak candidly he reminded us the Board makes the decisions. The helped us to trust and own our decision making process. Thank you Ben and company.

Dr. Jacqueline Reid, Santa Barbara Unified School District, CA

"I highly recommend Ben Johnson II and Dr. Daryl Adams of McPherson and Jacobson to any district doing a superintendent search. Throughout the process, Mr. Johnson and Dr. Adams offered us advice that helped us to make better decisions. Overall the service was excellent."

July 2018

To Whom It May Concern:

Teri Vigil, consultant for McPherson & Jacobson, L.L.C., led our school district in the search for a new district superintendent/principal. It was my pleasure to serve as the point of contact for this endeavor.

I found Teri to be accessible, knowledgeable and professional. But, most of all, I appreciated her sincere caring for our district. Serving, as she does, on the school board of a small, rural district, Teri knows the needs and issues affecting rural districts. She truly understands the need for a special individual to lead such a district.

McPherson and Jacobson enabled our search to cover the United States.

Teri flew the position via McPherson and Jacobson, completed the paper screening of applicants, carried out the reference checks and then presented the school board with a list of possible candidates to be interviewed. Our small, rural district was presented with first-class candidates from which to choose.

Teri also contacted candidates to be interviewed, set up the interviews, provided the list of interview questions to be used and served as the facilitator of the interviews. The list of interview questions used were based on the earlier work completed with stake- holders. These questions were focused on the specific needs and concerns of those stakeholders.

The result of the work done on behalf of our district by McPherson and Jacobson, L.L.C., and most especially by Teri Vigil, has enabled us to put into place a dynamic, accomplished Superintendent/Principal.

It was a pleasure to work with Teri. Her work on behalf of our district gave me peace of mind; I did not have to worry about the quality, or thoroughness, of the superintendent/principal search. Teri always kept the children in the district as the primary focus of this search; she worked to find a candidate who would strive to do the best for the students of Fort Sage Unified School District.

Claire Schumacher

Vice President

Fort Sage Unified School District Board of Trustees