



Proposal to Conduct a Superintendent Search for



MARYSVILLE JOINT UNIFIED SCHOOL DISTRICT

May 11, 2021



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Search Firm and Consultant Contact Information



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SENT VIA EMAIL

May 11, 2021

Randy L. Rasmussen
 President
 Marysville Joint Unified School District
 1919 B Street
 Marysville, CA 95901

Dear President Rasmussen and Marysville Joint USD Board of Trustees:

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

Our firm has worked with a wide variety of school districts throughout California since our founding in 1996. Since that time, Leadership Associates has completed more than 550 executive searches, with the majority being superintendent searches, for California school boards. More than 85% of the superintendents selected have remained in their positions for more than five years. We are an executive search firm that focuses its work in California, which has helped us deepen our understanding of the ever-changing California educational landscape.

Our most recent experience incorporates conducting most, if not all, of the phases of a search in a virtual format, given the desires of the Board and the circumstances that exist at the time. We understand the challenges your district may be facing during this time, and we are prepared to adapt our processes and protocols to meet or exceed your specific expectations throughout the entire search.

Our work includes partnering with Boards in several similar and/or nearby districts such as Amador County USD, Plumas USD and Folsom-Cordova USD. Through the continued participation of several of our partners in education organizations such as the California Collaborative for Educational Excellence (CCEE) and the California County Superintendents Educational Services Association (CCSESA), we have remained current on key education policy and system wide developments including Local Control and Accountability Plan (LCAP) and Local Control Funding Formula (LCFF) legislation. We have a strong record of success in helping districts find superintendents who meet the profile developed by the Board with extensive engagement from staff, parent leaders and community led by Leadership Associates.

Through our years of experience, we have come to understand and respect the uniqueness of each board and district. While there are similarities among districts, we believe that each

district has a unique culture that is important to respect and understand. There are many good superintendent candidates but only some will be the right match for your school district. It is our job and our commitment to you to find those candidates that best match your ideals and beliefs as a district.

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

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

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

Respectfully,



Rich Fischer
Lead Consultant
Leadership Associates



Tom Changnon
Co-Lead Consultant
Leadership Associates



EXECUTIVE SUMMARY

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

1. We view each district as unique and therefore work as partners with the Board to develop a customized approach that the Board may use to select its new superintendent.
2. Through more than 550 executive searches in California, the majority of these being superintendent searches, we have developed processes that lead to the successful hiring of candidates who meet the profile developed by the Board. These processes include engaging key stakeholders, conducting extensive recruiting and thorough reference checking, and working with the Board throughout the interview and contract approval processes.
3. Our partners are all former superintendents with successful leadership experiences in a variety of districts and in state and national organizations. We know the work. And we know who will do it well.
4. We understand and respect the factors that contribute to a highly effective governance team. We are committed to helping Board members work collaboratively with each other throughout the various stages of the selection process. Done well, a search will always strengthen the work of the Board and pave the way for a successful superintendent.
5. We bring the Board highly qualified candidates. In some respects our job is to make your ultimate decision a difficult one. We are proud of the high quality leaders we have been able to bring forward for Board consideration.
6. Our belief is that in order for superintendents to be successful they must have successful leadership experience leading and managing complex organizations. They should know what excellence in curriculum and instruction looks like and be deeply committed to equity. Their behavior must be of the highest integrity and reflect ethical values in their relationships with students, staff, community, and the Board. They must support powerful teaching and learning, build leadership capacity, and strengthen systems and processes that support high levels of achievement for all students.
7. We will always provide our best recommendations to the Board including those related to the hiring of specific candidates and the importance of maintaining a high degree of confidentiality so that the best possible candidates come forward.

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



SEARCH PROCESS PLAN

Leadership Associates has developed criteria to provide the Board of Education with a 9-phase process for selecting its next superintendent. The following is a brief description of each of the key steps of the search process, including identifying key personnel in each phase. The Board's designated administrative support staff will be guided and supported by our highly experienced executive assistant and provided with guidelines, templates, samples, checklists, and personal communication throughout the entire process.

****Indicates meetings with the Board***

Phase 1: **Initial Meeting with the Board* (Key Personnel: Consultants, Board, LA / district admin support; district I.T. support)

Leadership Associates will confer with the Board upon our selection to represent your district. At this meeting we will discuss all matters addressed in the Request For Proposal (RFP) Scope of Services, including the characteristics the Board is seeking in the next superintendent; District strengths and challenges for the future; the process for engaging groups and individuals in the District and community in the search process; approval of an official timeline and meeting dates; Board and Search Firm protocols during the search; possible contract parameters for the new superintendent; potential internal candidates; the Board's liaison with Leadership Associates and spokesperson for the Board; and all other matters addressed in the RFP Scope of Services which the Board may wish to discuss. We will meet with Board members individually, in person or by phone to learn each member's unique perspective. We will also be prepared to suggest criteria for consideration based on our own professional expertise. Immediately following the initial meeting we will work with district staff to create a Superintendent Search webpage on the district's website where members of the community can receive updates on the search process, including timelines, dates of community engagement opportunities, and access to online surveys.

Phase 2: Community and Staff Input (Key Personnel: Consultants, LA / district admin. support)

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

Phase 3: Position Description (Key Personnel: Consultants, LA / district admin. support)

The Position Description will clearly state the criteria which applicants for the position should address in completing their application. It will also reflect input received on qualities and characteristics desired, a description of the District and community, and key search dates. The Board reviews the draft and makes changes before the description is finalized. The description is posted on our website, distributed widely, and can be posted on the District's website.

Phase 4: Advertising, Recruitment, Reference Checking (Key Personnel: Consultants)

After our sessions with the Board, staff and community, we advertise and actively recruit both statewide and nationally. We will also conduct reference and database checks on all potential candidates. All partners participate in this process in order to take advantage of our extensive state

and national network. These are very critical activities as we work diligently to find the candidates that best match those qualities and characteristics on the Position Description. We verify degrees, credentials and professional experiences. We do extensive confidential reference checking including conversations with people not listed on the candidate's application. We keep the Board informed on a regular basis about the progress of the search.

Phase 5: *Selection of Finalists (Key Personnel: Consultants, Board, LA / district admin. support)

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

Phase 6: *Final Interviews (Key Personnel: Consultants, Board, LA / district admin. support)

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

Phase 7: Validation Process; Contract (Key Personnel: Consultants, Board, LA / district admin. support)

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

Phase 8: Public Approval of Contract (Key Personnel: Consultants, Board, district admin. support)

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

Phase 9: After the New Superintendent is Signed (Key Personnel: Consultants, New Superintendent)

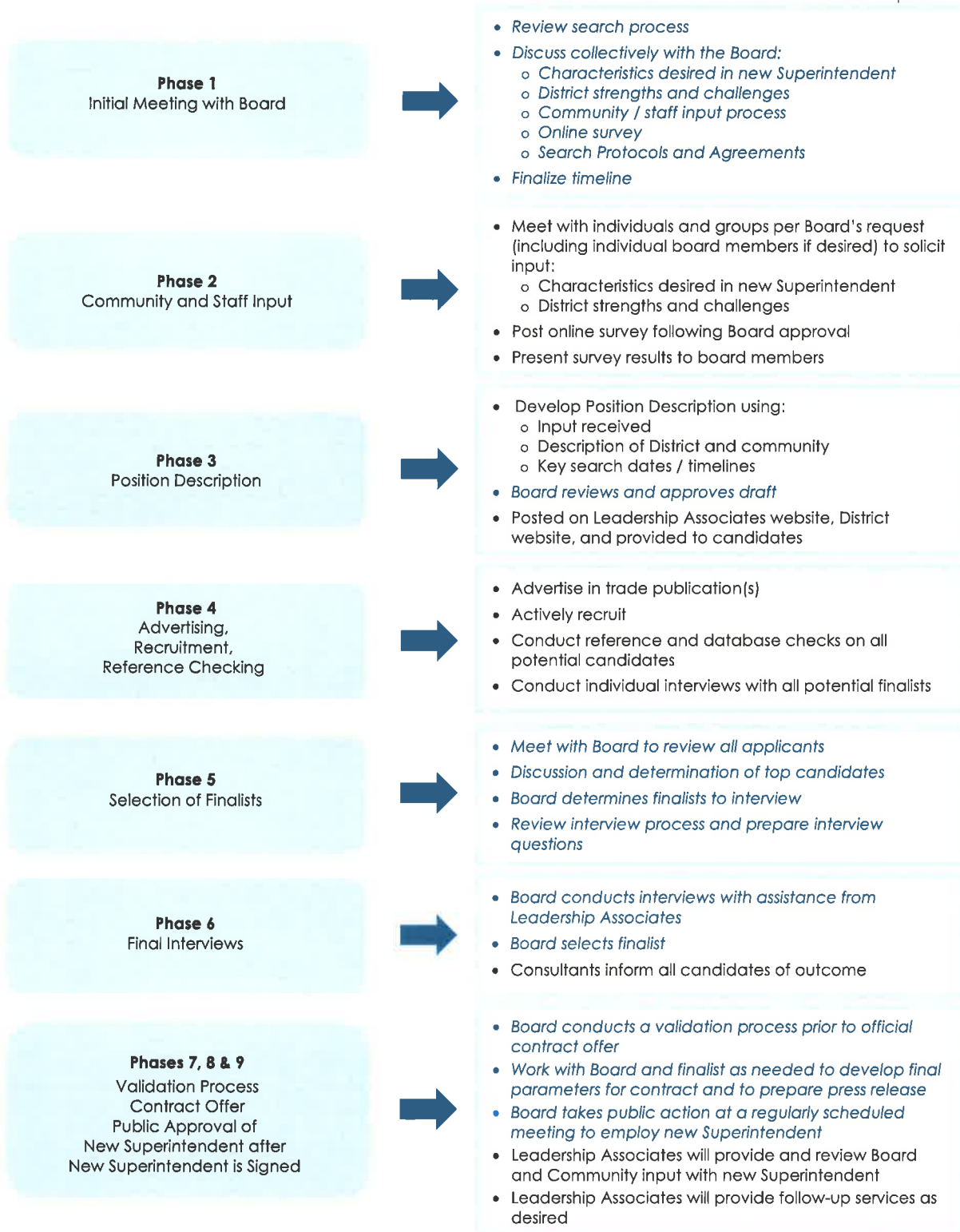
We provide and review with the new superintendent the Board and community input. We are available to provide additional follow up services as desired. These services could include developing a transition plan and an initial workshop for the governance team to establish goals for the new superintendent,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

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



SUPERINTENDENT SEARCH PROCESS FLOW CHART

Note: *Blue italicized text indicates Board Participation*





COST PROPOSAL

MARYSVILLE JOINT UNIFIED SCHOOL DISTRICT SUPERINTENDENT SEARCH 2021

TOTAL FEE TO CONDUCT SEARCH: \$21,500 (all-inclusive)

This fee includes:

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



SAMPLE CONTRACT

LEADERSHIP ASSOCIATES
www.leadershipassociates.org
3905 State Street #7-407
Santa Barbara, CA 93105
(530) 302-5112

AGREEMENT FOR CONSULTANT SERVICES

THIS AGREEMENT is made this ____ **day of MAY 2021** between LEADERSHIP ASSOCIATES, hereinafter called the Contractor, and **MARYSVILLE JOINT UNIFIED SCHOOL DISTRICT**, hereinafter called the District.

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

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

The District agrees to pay the Contractor **TWENTY-ONE THOUSAND, FIVE HUNDRED DOLLARS (\$21,500)** for services provided. Payment is to take place in two increments: **(1) \$10,750** upon completion of stakeholder input, and **(2), \$10,750** upon selection of a finalist. The Contractor will submit invoices to the District for each of the payment increments. Payments are due within 30 days of receipt of invoice.

Remittance payable/forwarded to: Leadership Associates
Attn: Linda Hunt
50855 Washington Street #C-205
La Quinta, CA 92253

The Contractor is to perform the above services beginning May ____, 2021.

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

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

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

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

DISTRICT:
MARYSVILLE JOINT UNIFIED SCHOOL DISTRICT

By: _____

By: _____

Name: Rich Fischer

Name: _____

Title: Lead Consultant

Title: _____

Date: _____

Date: _____



QUALIFICATION STATEMENT

EXPERIENCE AND QUALIFICATIONS OF THE FIRM

Leadership Associates has conducted over 550 executive searches in California since 1996. We have 14 partners and associates, all active educators and former, successful California superintendents who reside throughout the state – north, south, and central valley. While we are dedicated to California school districts, we have networks throughout the country and have assisted many school boards in finding top candidates from outside the state.

A few other facts about the partners of the firm:

- All keep superintendent searches as their core work
- All have national and state-wide networks and alliances including Council of the Great City Schools; Urban Education Dialogue (UED); Association of California School Administrators (ACSA); California Association of Latino Superintendents and Administrators (CALSA); California Association of African-American School Administrators (CAAASA); California Collaborative for District Reform; (CCDR); American Association of School Administrators (AASA); Suburban School Superintendents; and California City School Superintendents
- All belong to organizations which include top and emerging leaders
- Three were California State Superintendent of the Year
- Three chaired ACSA's California state superintendent's committee; two were ACSA presidents
- A number are bi-lingual in Spanish
- Many facilitate workshops in districts throughout the state: board/superintendent relations; board/superintendent protocols; strategic planning; superintendent evaluations; team building; and instructional improvement. Several coach and mentor superintendents and other top district leaders
- Most have taught or are currently teaching leadership courses at universities
- All have received awards for educational and community work, regionally, statewide, and nationally; and one was honored by the Mexican Consulate
- Partners have authored or co-authored the following publications; A Practical Guide to Effective School Board Meetings; Eight at the Top; Superintendent-School Board Practices; and The Superintendent's Planner
- District/Board Executive Assistant and administrative staff receive ongoing support and guidance from highly-qualified personnel with parallel district office experience

DIVERSITY POLICY

We value diversity in the workforce and embrace the cultural and demographic dimensions of our state and country. We work diligently to recruit candidates that represent the range of personal and professional backgrounds, and experiences and perspectives that arise from differences of culture and circumstances. This includes persons of varying age, ethnicity, gender, disability, race, sexual orientation, gender identity, religion, national origin, political affiliation, socioeconomic and family status, and geographic region.

QUALIFICATIONS OF LEAD CONSULTANT

Richard Fischer – Partner / Lead Consultant

Rich served as Superintendent of Schools for 19 years in the Mountain View Los Altos Union High School District, Lake Tahoe Unified School District and the Harmony Union School District. He currently serves as Director of the Executive Leadership Center and is also a member of the El Dorado County Board of Education. Rich has been Director for the ACSA Superintendents' Academy and presenter and trainer

for California Association of School Business Officials, California Foundation for Improvement of Employer-Employee Relations (CFIER), California State Superintendents' Symposium, El Dorado County Instructional Leaders - Series on Effective Leadership Techniques, Leadership Mountain View, and California School Leadership Academy. He has been honored as ACSA Regions 1,2,3 Superintendent of the Year and Administrator of the year as well as being named Los Altos of the Year in 2006. Rich received his Bachelor of Arts Degree from California State University, Northridge and his Master's Degree from California State University, Sacramento.

Tom Changnon – Associate / Co-Lead

Tom served as Stanislaus County Superintendent of Schools from 2007-2019. In his 12 years in office, Tom championed Civics Education, Character Development, Parent Involvement and Career Technical Education (CTE) programs. He earned his BA degree from Stanford University, Master Degree(s) in School Administration (St. Mary's, USF), and Teaching Certifications from College of Notre Dame. Tom has over 40 years of education experience at the elementary, middle, and high school levels. He also served as Assistant Superintendent and Superintendent prior to his election as the County Superintendent. Tom is an active member of the Association of California School Administrators (ACSA) serving on many local, regional and state committees including ACSA's Small School District Committee. Tom has received a number of awards, including being selected twice for the Bill Ullom Award and twice a recipient as the regional Superintendent of the Year award. In 2018 he received the Chamber Lifetime Citizen Achievement Award.

QUALIFICATIONS OF SUPPORTING CONSULTANTS

Eric D. Andrew, Ed.D. – Partner

Dr. Andrew began his education career in 1979 as a teacher in Claremont Unified School District, where he taught students in kindergarten through sixth grade, and later became a site principal for elementary, middle and high school levels. Dr. Andrew served as Director of Student Services in Redlands Unified School District, served as an Assistant Superintendent of Educational Services in Glendora Unified School District, and later became Superintendent of the Campbell Union School District, a position he held for seven and a half years. Dr. Andrew is currently the President of the Region 8 Retiree Charter, a Region 8 Executive Consultant, and is on board California Association of African American School Administrators (CAAASA) and Santa Clara County Alliance of Black Educators (SCCABE). He also serves as an active member of the California Association of Latino School Administrators (CALSA). As a well-respected equity-focused administrator and instructional leader, he has earned several distinctions, including being named a finalist for the National Association of School Superintendents (NASS) Superintendent of the Year (2017). Dr. Andrew has been recognized by the Association of California School Administrators (ACSA) as the Region 8 Superintendent of the Year (2014), the State and Region 15 Central Office Administrator of the Year (2009), and the Region 12 Pupil Services Administrator of the Year award (2005). He holds a master's in education from Cal-Poly, Pomona, an administrative credential from Cal State San Bernardino and a doctorate in education from the University of LaVerne.

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

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

American Association of School Administrators (AASA), Southern California Superintendents, Urban Education Dialogue and Educational Research Development Institute (ERDI).

Marc A. Ecker, Ph.D. – Partner, Chief Financial Officer

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

Sally Frazier, Ed.D. – Partner, Member at Large

Sally was elected Madera County Superintendent of Schools for six consecutive 4-year terms. She received her Doctorate from University of Southern California, and her Master's and Bachelor's degrees from California State University, Stanislaus. Sally served the California County Superintendents' Educational Services Association as President, Legislative Chairperson and numerous terms on its Executive Board. She was CCSESA's representative to ACSA's Superintendents Committee and its liaison to the Springboard Schools Board of Directors. Sally chaired CCSESA's Commission on the Organization of Policy Groups, Organizing for Action. Sally was appointed by former State Superintendent of Public Instruction, Delaine Eastin, to the Education Commission for Technology in Learning. Sally was also appointed by Governor Schwarzenegger to the Advisory Commission on Juvenile Justice and Delinquency.

Juan Garza – Partner

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

Peggy Lynch, Ed.D. – Partner

Peggy served as Superintendent for San Dieguito Union High School District in San Diego County until her retirement in April 2008. She also served as Superintendent of the Brea Olinda Unified School District in North Orange County for seven years, part of her nearly 14 years serving as a superintendent. Peggy has experience conducting executive searches since 2009, and has facilitated or assisted in the facilitation of more than 60 executive searches. She received her doctorate from the University of La Verne, her Master's Degree from Fullerton and her Bachelor's Degree from Parsons College in Iowa. Peggy chaired the ACSA Orange County and San Diego County Superintendents, was chair of the ACSA Superintendents' Symposium and ACSA's State Annual Conference. Peggy has received recognition from various organizations, including Southern California Women in Educational Management, Stanford University School of Engineering and the PTA. She has also co-authored several books, including *Effective Superintendent-School Board Practices*; *The Superintendent's Planner*, *A Monthly Guide and Reflective Journal*; and *Eight at the Top: A View Inside Public Education*.

Phil Quon – Partner

Phil served as Superintendent for 19 years in the Bay Area – 13 years at Union School District in San José and the last six years in Cupertino Union School District. He served as the President of the statewide ACSA

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

Dennis M. Smith, Ed.D. – Partner, Search Lead

Dennis served as Superintendent of Schools for the Placentia Yorba Linda Unified School District (27,000 ADA) in Orange County until his retirement in June 2012. He also served as superintendent of the Orange County Public Schools in Orlando, Florida, the 16th largest school district in the United States. Prior to that, he served as superintendent of the Irvine Unified, Cajon Valley Union and Laguna Beach Unified School Districts. Dennis served a total of 26 years as a Superintendent of Schools. Dennis has experience conducting executive searches since 2005, and has facilitated or assisted in the facilitation of more than 70 executive searches. Dennis was recognized as one of the top 100 Executive Educators in North America by the National School Boards Association, one of the 89 Rising Stars to Watch by the Los Angeles Times, one of the 100 Most Influential Business Leaders in Central Florida by the Orlando Business Journal, and the ACSA Region XVII Superintendent of the Year. He also served as President of the Southern California Superintendents' Association. Dennis received his Bachelor of Arts and Master's Degree from Arizona State University and his Doctorate from the University of Arizona. In addition, he has been an adjunct faculty member at California State University, Fullerton. Dennis has spoken at the local, state and national level on Board- Superintendent relations, Strategic Planning and Goal Setting and Organizational Management. He has consulted with school districts across the United States assisting school boards with superintendent searches and conducting workshops, trainings and organizational efficiency audits.

Rich Thome – Partner

Rich Thome has conducted over 101 executive searches and 154 Board Workshops since 2003. Rich joined Leadership Associates in 2006. Prior to joining Leadership Associates, he also served as Director, Professional Learning in the Mobile Technology Learning Center (MTLC), a research center in the School of Leadership and Education Sciences (SOLES), at the University of San Diego. Prior to that assignment, he served as Director Educational Leadership Development Center at the University. In addition, Rich was an Executive Coach for Pivot Learning Partners in Los Angeles and San Diego Counties. His prior work included serving as Superintendent of the South Bay Union and Cardiff School Districts, Assistant Superintendent of Human Resources and Technology, and Superintendent Search Consultant for the San Diego County Office of Education. He also worked for 23 years as Teacher, Principal, Coordinator, Director and Assistant superintendent in the Capistrano Unified School District. Rich recently served on the University of San Diego School of Leadership and Education Sciences Advisory Board and on the Classroom of the Future Foundation Board of Directors. He received his Bachelor's degree from CSU, Los Angeles, and his Master's from Pepperdine University. Rich is Latino, is fluently bilingual in Spanish and received his Bilingual, Cross Cultural Specialist credential in California. Rich was awarded the prestigious Ohtli Award in 2008 for his 40 years of services to the Latino Community. In 2007 he was awarded the Excellence in Leadership Award by the University of California, San Diego, and in 2006, the Willie Velasquez Community Service Award. He is also a recipient of the Honorary Service Award from the California Congress of Parents, Teachers and Students; and the Orange County Hispanic Educator of the Year Award.

Sandy Sanchez Thorstenson – Partner

Sandy Sanchez Thorstenson served as the Superintendent of the Whittier Union High School District for fifteen years having spent her entire 39-year career in Whittier Union. Prior to becoming Superintendent, Mrs. Thorstenson served as Assistant Superintendent, Educational Services, High School Principal, Assistant Principal and Teacher. The Whittier Union High School District, a minority-majority high school district with

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

Fred Van Leuven, Ed.D. – Associate

Fred served as President of Accrediting Commission for Schools of the Western Association of Schools and Colleges, (ACS WASC) for the San Francisco Bay Area from 2013 through 2018. He has served as the School Assistance Intervention Team Lead for Roosevelt High School in Fresno Unified and DAIT Team Member in Palmdale Elementary School District. He has assisted school boards, school districts and schools throughout California, Hawaii and Guam in a variety of key areas. He served as Superintendent of Santa Ynez Valley Union High School District for 12 years beginning in 1996, after three years as Director of Secondary Education for the Conejo Valley Unified School District, and retired in 2008. He also served as teacher and administrator for 13 years in the Saddleback Valley Unified School District and four years as Poway High School Principal in San Diego County. Fred is a graduate of the University of Southern California and holds a Doctorate in Education.

David J. Verdugo, Ed.D. – Partner

David served as Superintendent for the Paramount Unified School District (17,000 ADA) in Los Angeles County for 9 years. He also served as Assistant Superintendent of the Placentia-Yorba Unified School District (25,000 ADA, Director of Secondary Education, Principal at both Elementary and High School levels, teacher, and coach. He has a total of 43 years in the field of education spanning Grades K-12. His duties have included school facility management, extensive involvement with budget development, implementation of technology programs, employer/employee relations, curriculum and instructional strategies, and organizational development. His experience includes serving students of diverse populations and socioeconomic levels in urban and suburban settings. He was named the Association of California Administrators (ACSA) Region XIV Superintendent of the Year; received the California State University, Long Beach Outstanding Superintendent Leadership Award in 2012; the ALAS, Association of Latino Administrators and Superintendents; National Outstanding Educator Award in 2013; and, in 2020, was inducted into the University of Southern California USC Rossier School of Education "Hall of Fame", making him only the 23rd recipient of this prestigious award. He earned his Bachelor's Degree from Whitworth College in Spokane, Washington and his Master's Degree from the University of La Verne. His Doctoral Degree in Educational Administration was earned at the University of Southern California. Dr. Verdugo is a past Governing Board member to AASA and has addressed and spoken on State and National topics from building a case for reform to the importance of Arts in schools. He was the Executive Director of the California Association of Latino Superintendents and Administrators (CALSA) until 2019, as well as the former Superintendents' Leadership Academy Director for the Association of Latino Administrators and Superintendents (ALAS) based in Washington, D.C.



EXECUTIVE SEARCHES 2013-CURRENT

STATEWIDE

Association of California School Administrators (ACSA)	Executive Director
California Collaborative for Educational Excellence (CCEE)	Executive Director
California County Superintendents Educational Services Association (CCSESA)	Executive Director
WestEd/GATES	Executive Director

COUNTY OFFICE OF EDUCATION SUPERINTENDENT

Los Angeles County – 2011	1,500,000+ ADA
Santa Clara County – 2008	275,000+ ADA

SCHOOL DISTRICT SUPERINTENDENT (2013-Current)

<u>District</u>	<u>County</u>	<u>ADA</u>
Fresno USD	Fresno	73,356
San Francisco USD	San Francisco	58,865
Santa Ana USD	Orange	57,410
Capistrano USD	Orange	53,833
Corona-Norco USD	Riverside	53,148
Sacramento City USD	Sacramento	47,616
Oakland USD	Alameda	46,486
Riverside USD	Riverside	42,560
Stockton USD	San Joaquin	40,984
Fontana USD	San Bernardino	40,374
San Jose USD	Santa Clara	32,938
Anaheim Union HSD	Orange	32,085
San Ramon Valley USD	Contra Costa	31,900
Mt. Diablo USD	Contra Costa	31,013
West Contra Costa USD	Contra Costa	30,596
Bakersfield City SD	Kern	30,262
Modesto City Schools	Stanislaus	30,718
Orange USD	Orange	28,522
Saddleback Valley USD	Orange	27,803
Rialto USD	San Bernardino	26,468
Placentia-Yorba Linda USD	Orange	25,821
Palm Springs USD	Riverside	23,332
Lake Elsinore USD	Riverside	22,000
Hemet USD	Riverside	21,977
Pajaro Valley USD	Santa Cruz	20,438
Folsom-Cordova USD	Sacramento	19,865
Anaheim City SD	Orange	19,312
Alvord USD	Riverside	19,255
Coachella Valley USD	Riverside	18,861
Riverbank USD	Stanislaus	18,750
Antioch USD	Contra Costa	18,352
Panama-Buena Vista Union SD	Kern	18,250
Ventura USD	Ventura	17,430
Santa Rosa City Schools	Sonoma	16,700
Oxnard SD	Ventura	16,533
Burbank USD	Los Angeles	16,207
Cajon Valley Union SD	San Diego	16,059
Paramount USD	Los Angeles	15,681
Santa Clara USD	Santa Clara	15,509
Walnut Valley USD	Los Angeles	14,658
Vallejo City USD	Solano	14,554
West Covina USD	Los Angeles	14,402
Fullerton SD	Orange	13,661
Vacaville USD	Solano	12,561
Inglewood USD	Los Angeles	12,570
San Dieguito UHSD	San Diego	12,485

<u>District</u>	<u>County</u>	<u>ADA</u>
Palo Alto USD	Santa Clara	12,357
Natomas USD	Sacramento	12,300
Metropolitan Education	San Jose	12,000
Oak Grove SD	Santa Clara	11,800
Upland USD	San Bernardino	11,665
Victor ESD	San Bernardino	11,531
San Lorenzo USD	Alameda	11,530
Evergreen School District	Santa Clara	11,385
Alameda USD	Alameda	11,299
Franklin-McKinley SD	Santa Clara	11,269
Merced City USD	Merced	11,009
Lucia Mar USD	San Luis Obispo	10,710
Pittsburg USD	Contra Costa	10,560
Azusa USD	Los Angeles	10,518
Berkeley USD	Alameda	10,340
Dublin USD	Alameda	10,000
Roseville City ESD	Placer	9,943
Los Alamitos USD	Orange	9,833
Yucaipa---Calimesa Joint USD	San Bernardino	9,655
Ocean View SD	Orange	9,461
Westminster SD	Orange	9,264
Santa Maria JUHSD	Santa Barbara	7,633
East Whittier City ESD	Los Angeles	8,829
Davis Jt. USD	Yolo	8,626
San Mateo Union HSD	San Mateo	8,163
Novato USD	Marin	8,078
South Bay UESD	San Diego	7,682
San Rafael City Schools	Marin	7,200
Santa Cruz City Schools	Santa Cruz	7,092
Newhall SD	Santa Clarita	6,831
Fountain Valley USD	Orange	6,337
Newark USD	Alameda	6,294
Ukiah USD	Mendocino	6,214
Brea Olinda USD	Orange	5,973
Alta Loma SD	San Bernardino	5,900
Santa Paula USD	Ventura	5,454
Orcutt Union ESD	Santa Barbara	5,087
Oakley Union SD	Contra Costa	4,871
Buena Park SD	Orange	4,684
Moreland SD	Santa Clara	4,670
Charter Oak USD	Los Angeles	4,581
Sonoma Valley USD	Sonoma	4,564
San Lorenzo Valley USD	Santa Cruz	4,444
Belmont-Redwood Shores SD	San Mateo	4,308
Wiseburn USD	Los Angeles	4,301
Ravenswood City SD	San Mateo	4,296
Paradise USD	Butte	4,261
Duarte USD	Los Angeles	4,247
Lindsay USD	Tulare	4,150
Central UHSD	Imperial	4,104
Cypress SD	Orange	4,000
Brawley ESD	Imperial	3,980
Eureka City Schools	Humboldt	3,884
Lake Tahoe USD	El Dorado	3,872
Hanford Joint Union HSD	Kings	3,802
Amador County USD	Amador	3,829
Lemon Grove SD	San Diego	3,797
Mountain View-Los Altos UHSD	Santa Clara	3,753
Goleta Union SD	Santa Barbara	3,718
Del Norte County USD	Del Norte	3,591
Cabrillo USD	San Mateo	3,357
Cambrian SD	Santa Clara	3,349

<u>District</u>	<u>County</u>	<u>ADA</u>
Pacifica SD	San Mateo	3,150
San Marino USD	Los Angeles	3,146
Mill Valley Elementary SD	Marin	3,086
Exeter Public Schools	Tulare	3,000
Standard ESD	Kern	2,979
South Whittier ESD	Los Angeles	2,918
San Bruno Park ESD	San Mateo	2,785
Oroville City ESD	Butte	2,696
Castaic Union SD	Los Angeles	2,568
Fowler USD	Fresno	2,562
Scotts Valley USD	Santa Cruz	2,482
Jefferson SD	San Joaquin	2,477
Carmel USD	Monterey	2,468
Bear Valley USD	San Bernardino	2,453
Galt JUHSD	Sacramento	2,287
Lammersville JUSD	San Joaquin	2,200
Woodlake USD	Tulare	2,192
Red Bluff Union ESD	Tehama	2,178
Plumas USD	Plumas	2,130
Fort Bragg USD	Mendocino	1,917
Willits USD	Mendocino	1,907
Mariposa County USD	Mariposa	1,816
Byron Union SD	Contra Costa	1,686
Reed Union SD	Marin	1,556
Larkspur-Corte Madera SD	Marin	1,523
Colusa USD	Colusa	1,450
Las Lomitas ESD	San Mateo	1,336
Sierra USD	Fresno	1,323
Wilsona SD	Los Angeles	1,315
St. Helena USD	Napa	1,295
Guadalupe Union SD	Santa Barbara	1,280
Fall River JUSD	Shasta	1,209
Kentfield SD	Marin	1,177
Taft UHSD	Kern	1,045
University Preparatory School	Shasta	900
Bass Lake JUSD	Madera	891
Lassen UHSD	Lassen	825
Banta ESD	San Joaquin	770
Wheatland UHSD	Yuba	739
Rancho Santa Fe SD	San Diego	700
Emery USD	Alameda	687
Summerville UHSD	Tuolumne	624
Calaveras COE	Calavera	450
Eastern Sierra USD	Mono	417
Le Grand Union ESD	Merced	401
Kings River Union ESD	Tulare	476
Alview-Dairyland Union SD	Madera	367
Clay Joint ESD	Fresno	250

EXECUTIVE DIRECTOR/DIRECTOR

Baldy View ROP	San Bernardino
Birmingham Community Charter HS	Los Angeles
East San Gabriel Valley SELPA	Los Angeles
Oxford Preparatory Academy	Orange
San Ramon Valley SELPA	Contra Costa
So Orange County SELPA	Orange



COMMENDATIONS FROM BOARD MEMBERS

Mt. Pleasant ESD: At every step of the way we found the services of the staff at Leadership Associates to be responsive to the specific needs of our district and the rapidly changing circumstances surrounding the [COVID-19] crisis. I highly recommend the services of Leadership Associates and specifically Eric Andrew and David Verdugo.

CCSESA: It was a pleasure to have your outstanding team provide such an important service to this process! This is a critical position and your team did a superb job in helping to ensure the process was collaborative, transparent and resulted in a selection of a top notch person!"

Lucia Mar USD: Thank you to Leadership Associates, especially Phil Quon and Fred Van Leuven, for leading our district through a professional and successful superintendent search. Your pre-search activities, outreach, screening, organization of materials and leadership was outstanding. We found our new superintendent and are confident we found a perfect fit."

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

Wiseburn SD: Thank you for your thoughtful leadership and guidance in the process. It was an absolute pleasure meeting you, getting to know you and working with you. I certainly look forward to future opportunities and interactions with you. I think we made two excellent choices in Leadership Associates and Dr. Blake Silvers.

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

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

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

East Whittier City SD: Thank you for appointing Sandy Sanchez Thorstenson and Marc Ecker to supervise and coordinate our superintendent search. They ran the interviews like clockwork with plenty of time for reflection of each candidate at the end of the interview. We were presented with six outstanding candidates. It was challenging to decide which of them was the best fit for our District. We are confident that our choice of superintendent is that best choice. We were delighted to work with Sandy and Marc, and will gladly recommend them as the premier search team.

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

Panama-Buena Vista SD: Leadership Associates is well connected throughout the state. The process from beginning to end was well communicated and very organized. Leadership Associates is literally a "who's who" of educators in the state. A successful superintendent search and hiring was our goal and Leadership Associates delivered!

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

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

Summerville JUHSD: Thank you for all the work you and the firm have completed. We know we were demanding because we have a really involved community. But you just moved forward and got the job done Great work!! We will highly recommend your service to any District in our County.

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

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

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

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

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

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

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

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

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

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

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

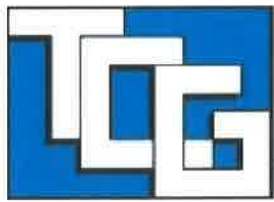
Fowler USD: Leadership Associates was completely thorough from their initial proposal to the Board, through the actual hiring of a successful superintendent candidate. The communication to all members of the Board and the designated District contact was exemplary throughout the process. Parents/community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

Fremont USD: Thank you all so much for your support and diligent work finding a great pool of candidates and helping us to select the best of the best.

Evergreen SD: Leadership Associates did an excellent job in our recent Superintendent Search process. This was the first time that our district has ever engaged in an external search process, and I found it much more rewarding and less stressful because of the superb support of Eric and Fred.

Santa Maria JUHSD: Great candidates! Appreciate your thorough vetting; best work yet for this district. My first-choice search firm does it again!!

Kentfield: Each of us is grateful for your great work on the search for Kentfield. we could not be more pleased by the thoughtful and extremely thorough search process. We particularly appreciated your flexibility, responsiveness, and creativity with the search over the past several weeks. Quite simply, you never skipped a beat with the search process, despite a global pandemic looming in the background. If there is ever a potential client on the fence about hiring you guys have them call me. They would be lucky to have you guys in their corner.



The Cosca Group
The Team Behind Your Team

CONFIDENTIALITY INCLUSIVENESS TRANSPARENCY

A SUPERINTENDENT SEARCH

PRELIMINARY PROPOSAL DETAIL

**PREPARED
FOR THE**

MARYSVILLE JOINT UNIFIED SCHOOL DISTRICT



March 1, 2019



TCG Leadership Development Corporation

2290 La Mer Court
Costa Mesa, CA 92627
909-782-1381
www.thecoscagroup.com
thecoscagroup@gmail.com

March 1, 2019

Board of Education
Marysville Joint Unified School District
1919 B St.
Marysville, CA 95901-3731

Thank you for the opportunity to be considered as the search firm to assist your selection of your new superintendent.

Choosing a new superintendent to lead any district is always a pivotal decision/ We are prepared to address your challenge. We are confident that we can deliver the quality support and services necessary to accomplish your objective and meet your expectations as well as those of your community. We proudly boast a record of success; the five-year longevity for TCG-placed superintendents is over 92%! We also enjoy a reputation for an authentic commitment to our clients; that is, purposely forming lasting, meaningful relationships with the superintendents and board members we serve.

The Cosca Group was founded by Dr. Frank Cosca in 2000. Today it is comprised of more than 30 partners and associate partners representing all geographical regions of California and embodying successful experience leading districts with student populations ranging from 1,500 to 57,000. TCG is comprised of recognized professionals who understand the role of superintendent and its demands and command sound operational expertise and insights, particularly in the areas of board/superintendent relations and school district governance. Our collective networks and our relationship with the National Association of School Superintendents affords us an extensive statewide and national recruitment base and significantly enhances our capacity to identify and attract qualified applicants from within the state as well as across the country.

A major aspect of our search process is our detailed, personal attention to engaging the full range of district stakeholders in identifying the unique needs and expectations of the District. This outreach effort, in past searches, has been inclusive and truly representative of the unique nature of each community and is intended to build support for the board, the district and new superintendent. With our proven expertise in all phases of school district leadership, has the capacity to assist the Governing Board in the selection of a new Superintendent and in developing the effective supportive working relationships that truly contribute to successfully serving the needs of your students, parents, staff and community.

We are pleased to offer Dr. George Bloch, Vice President of TCG, and Dr. Theresa Daem as the TCG search consultants for your district. Dr. Bloch has led 5 searches in San Diego County, from North County to Chula Vista, within the last three years. Dr. Daem is the founder of the National Association of School Superintendents and remains actively supportive of the organization. Both Dr. Bloch and Dr. Daem have well-developed special appreciation for the unique needs and challenges of Laguna Beach, a district and community somewhat comparable in size and socio-economic standing to yours. Dr. Daem served as Superintendent of LBUSD for nine years and Dr. Bloch has been a resident for more than 30 years.

As you contemplate selection of your search firm, we respectfully encourage you to consider these critical elements:

- ✓ TCG is widely recognized for its purposeful, personal attention to all phases of the search process.
- ✓ TCG-placed superintendents' longevity for five years *averages over 92%*.

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- ✓ TCG will customize its process to meet your needs.
- ✓ TCG is known for delivering strong, reliable communication throughout the process.
- ✓ TCG's extensive network of partners in the state and national level offers unparalleled access to qualified candidates.
- ✓ TCG supports the new superintendent for one year of mentoring at no extra cost.
- ✓ TCG offers an online survey to augment the stakeholder input collected in the extensive personal meetings with stakeholders.
- ✓ TCG guarantees a comprehensive disclosure of all applicants.
- ✓ TCG focuses on seeking candidates that meet the district needs, not placing an in-house candidate.
- ✓ TCG's fee is competitive and all-inclusive.
- ✓ A TCG placement will not be recruited for other TCG positions for a minimum of five years.
- ✓ A TCG guided workshop with the new Superintendent and the Board will further the early coalescence of your new governance team.
- ✓ TCG guarantees the new superintendent selection for the first two years. Should a new search be warranted, it would be conducted for expenses only.
- ✓ Your district's search will be the sole assignment of your search consultants.
- ✓ Your district's search team is committed to remaining intact throughout the process.

We look forward to the opportunity to present our proposal to you and your board. We would be honored to assist you in this most important endeavor.

For more information, please visit www.TheCoscaGroup.com or contact George Bloch at 949.499.9809.

Thank you in advance for your consideration.

Sincerely,



Frank A. Cosca, Jr., Ed.D.

President

The Cosca Group

thecoscagroup@gmail.com



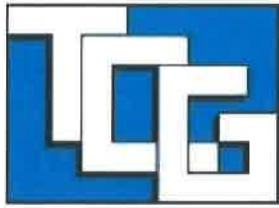
The Cosca Group
The Team Behind Your Team

FIRM PROFILE

The Cosca Group was founded in 2000 and has been involved in over 60 plus searches. TCG is comprised of 24 partners and 6 associates who are located throughout key areas of the north, south and central areas of California. While our focus is on superintendent searches, we are available to assist with cabinet, site and other key leadership searches.

WHO WE ARE

- TCG partners have successfully led geographically and culturally diverse school systems across California including small, suburban and urban school districts.
- All TCG partners and associates possess broad personal and professional networks within the state and on the national level.
- TCG partners and associates have served in leadership roles in Association of California School Administrators (President and Executive Director), California School Boards Association, American Association of School Administrators, California Association of School Business Officials and California Coalition for Adequate School Housing, California Small Schools Association, California Association of Latino Superintendents, and California Association of Bilingual Educators.
- A TCG partner was recognized by ACSA with the prestigious "Marcus Foster" award.
- Three TCG partners have been California Superintendents of the Year and nationally honored.
- A TCG partner founded the National Association of School Superintendents.
- TCG partners and associates teach or have taught graduate courses in Educational Leadership, School Finance and other specialties within the field of school district administration.
- TCG partners and associates have been honored with awards from educational, community, county and civic organizations.
- TCG partners have held leadership positions in the Western Association of Schools and Colleges and chaired visitations in California, Hawaii, Pacific Islands and Asia.
- Many TCG partners are bi-lingual in Spanish.
- As a result of our quality performance, numerous boards have selected The Cosca Group for subsequent searches.



The Cosca Group
The Team Behind Your Team

THE TCG COMMITMENT

TCG will provide continuous communication, frequent updates, and access to one or more consultants throughout the process.

~

TCG will provide multiple, well-publicized, and convenient opportunities for stakeholder input.

~

TCG will guide the Board in every phase; however, the Board will finalize every key decision in the search.

~

TCG will recommend multiple candidates that meet the Board's criteria.

~

TCG will conduct thorough background research on all finalists and reference checks for every candidate interviewed.

~

TCG will recommend candidates; however, the Board will select candidates to interview and decide who will be the new superintendent.



The Cosca Group
The Team Behind Your Team

SEARCH PHASES AND TCG SERVICES

The following process will be customized to meet your district's distinct needs and preferences. TCG services include, but are not limited to, the following:

PRELIMINARY

- ❖ Meet with the Board to adjust/modify/approve the Search and Selection Process and the accompanying proposed timeline.

THROUGHOUT

- ❖ Provide ongoing communication and regular updates.
- ❖ Provide direct access to a TCG consultant.
- ❖ Provide ongoing customer service and support.

PHASE 1: PRE-RECRUITMENT

- ❖ Conduct an exhaustive input collection process that incorporates three steps generally augmented by one or more online or hard-copy surveys.

TCG is committed to seeking out delivering the right candidate for the Marysville Joint Unified School District. To achieve that goal, your TCG team will conduct a comprehensive assessment to identify your district's unique needs and challenges before the selection process begins. Personally meeting with groups and individuals representing the district's stakeholders is a TCG priority. Experience has shown it to be the most effective way to gain a genuine understanding of the district's goals and objectives, the community and stakeholder needs and expectations, and the Board's preferences and requirements.

Step 1 Meet with the Board and identify the District's strengths and needs/critical issues. Based on those strengths and needs/critical issues, identify the characteristics desired in the new Superintendent. The Board will also identify groups and individuals representing community members, students, parents, teachers, classified employees, administrators, etc. to provide input to TCG. Discuss custom strategies to engage all representative communities within the District, including non-English-proficient constituents in the process.

Step 2 Meet with the identified groups and individuals and receive input regarding the District's strengths and needs/critical issues. Concurrently an online survey will be well-publicized and conveniently available to stakeholders. Input will be received regarding the desired characteristics of the new Superintendent and carefully recorded. The comments will then be tallied and categorized and become the basis of an objective summary.

Step 3 Meet with the Board to review and analyze the information generated in group and individual meetings and collected by the survey. The Board will have the opportunity to reexamine, modify and prioritize its lists of district strengths, needs/critical issues, and preferred characteristics. Using the data, TCG will craft a profile and criteria for an electronic brochure to be presented to the board for final approval.

- ❖ Prepare a draft electronic brochure that includes, but is not limited to, a synopsis of the District; the profile, expertise, and traits and characteristics preferred in candidates; and application requisites and deadlines for review and approval by the Board.
- ❖ Provide a status report to the Board.

PHASE 2: RECRUIT

- ❖ Distribute recruitment materials, vacancy announcements, and the electronic brochure throughout California and nationally if appropriate.
- ❖ Advertise the position in EdCAL and potentially in CASBO, Ed-Join, or other regional or national publications as appropriate.
- ❖ Reach out to all TCG partners and associates and TCG's extended network to identify and recruit suitable candidates who have not applied.
- ❖ Maintain all applicant files and keep applicants abreast of their status.
- ❖ Organize a Panel of Experts to screen and identify the most qualified applicants using the profile and criteria approved by the Board.
- ❖ Provide status report to Board.

PHASE 3: SELECT APPLICANTS TO INTERVIEW

- ❖ Screen all materials from all applicants. Extensive reference checks will be conducted through a process of telephone conversations, appraisal of materials, and preliminary references.
- ❖ Conduct initial reference checks.
- ❖ Convene the Panel of Experts to distinguish the most qualified candidates.
- ❖ Conduct comprehensive reference checks of the candidates identified by the Panel of Experts.
- ❖ Develop a comprehensive report that includes the qualifications of all of the applicants and detailed summaries of those applicants identified by the Panel of Experts and recommended for interviews by the Board.

- ❖ Facilitate Board selection and approval of candidates to be interviewed.
- ❖ Conduct a compensation study of superintendent compensation in districts selected by the Board (optional).

PHASE 4: INTERVIEW

- ❖ Confirm interview dates and procedure details with the Board.
- ❖ Develop a preliminary list of questions for Board review, amendment and approval.
- ❖ Arrange and facilitate closed session candidate interviews by the Board.
- ❖ Arrange and facilitate subsequent closed session interviews of top candidate(s).
- ❖ Arrange and facilitate Board selection of the finalist.

PHASE 5: APPOINT

- ❖ Arrange a site visitation to the district of the selected finalist.
- ❖ Coordinate the official appointment of the successful candidate by the Governing Board.
- ❖ Assist negotiation of the employment contract (optional).
- ❖ Facilitate a transition meeting for the new Superintendent and Board of Education (optional).
- ❖ Assist the Board in announcing the new Superintendent (optional)

OPTIONAL SERVICES

Twelve months subsequent to the formal appointment of the new superintendent, TCG will:

- ❖ Provide free ongoing, on-call, mentoring.
- ❖ Facilitate a free orientation workshop for the new Superintendent and the Board.
- ❖ Provide, for an additional fee, consulting services and workshops, including but not limited to, Goal Setting; the Superintendent Evaluation Process; Board-Superintendent Relations; and Roles and Functions of the Superintendent and the Board.

SERVICE APPROACH DETAIL

STAKEHOLDER INPUT

How is input summarized for the board and the community?

TCG's standard practice is a three step input collection process, usually augmented by an online survey.

Step 1. Meet with the Board and identify the District's strengths and needs/critical issues. Based on those strengths and needs/critical issues, identify the characteristics desired in the new Superintendent. The Board will also identify groups and individuals representing community members, students, parents, teachers, classified employees, administrators, etc. to provide input to TCG. Discuss custom strategies to engage all representative communities within the District, including non-English-proficient constituents in the process.

Step 2. Meet with the identified groups and individuals and receive input regarding the District's strengths and needs/critical issues. Concurrently an online survey will be well publicized and conveniently available to stakeholders. Input will be received regarding the desired characteristics of the new Superintendent and carefully recorded. The comments will then be tallied and categorized and become the basis of an objective summary.

Step 3. Meet with the Board to review and analyze the information generated in group and individual meetings and collected by the survey. The Board will have the opportunity to reexamine, modify and prioritize its lists of district strengths, needs/critical issues, and preferred characteristics. Using the data, TCG will craft a profile and criteria for an electronic brochure to be presented to the board for final approval.

SCOPE OF SEARCH

Will candidates be sought beyond the Southern California region? Outside of California?

How does the firm outline its recommendations for the extent of the search?

While many districts prefer candidates with California backgrounds because they are grounded in the state's unique policies and culture, in some cases boards prefer to reach out across the country to seek a fresh approach or a unique talent, or to cast a wider net.

TCG's standard practice is to base a search scope on the district's unique needs, challenges and preferences.

APPLICANT SCREENING

What is the specific process by which applicants are screened?

TCG's standard practice includes the following:

A panel of experts representing the district's administration will be identified to screen and select the most qualified applicants using the board-adopted candidate criteria; applications will be assessed for candidate capacity to meet the district's needs.

Vetting will include, but not be limited to, appraisal of materials, preliminary reference checks and verifications, internet background reviews, and review via TCG networks and contacts.

A report will be developed for the board that will include the names and key specifics of all applicants as well as detailed information and assessments of candidates recommended for consideration to interview.

INTERVIEW QUESTIONS

How are questions selected to help the board determine "best fit"?

TCG's standard practice is to help to facilitate the development of questions with the Board TCG will present the board with potential questions carefully selected for the purpose of revealing the applicants' background, experience, style, and personal traits relevant to the district and board's needs and preferences.

DISTRICT CONTACT(S)

Who is the contact for logistics, meetings with employees, community, etc.?

Typical search firm practice is to contact the Board President for information and clarifications and a district-assigned staff member for scheduling, logistics, and basic operational assistance. TCG's standard practice is to confirm these assignments with the board.

WRITING PROMPT

Do you include a writing prompt?

TCG's standard practice is to propose the option to the Board. If included, TCG will include recommendations for Board consideration at the same time the Board determines what questions will be included in candidate interviews.

STAKEHOLDER COMMUNICATION PROCESS

Describe internal and external communication processes used to help the board inform the full range of employees and community groups.

TCG's standard practice is to collaborate with the Board and the district staff to identify the processes and procedures currently utilized and customize strategies and schedules that offer the most effective communication strategies for students, parents, employee groups, city officials and staff, and community groups. Most districts opt for a combination of social media and district website announcements and updates.

COST ANALYSIS

Marysville Joint Unified School District Superintendent Search 2019

The fee for a search design specific to the Marysville Joint Unified School District is estimated to be between \$23,664 and \$27,774, inclusive of the following services and expenditures:

- ❖ All lead consultant travel and lodging expenses
- ❖ All clerical expenses
- ❖ All state and national advertising expenses
- ❖ Conducting all meetings with community input sessions
- ❖ Preparing written input reports for all stakeholder sessions
- ❖ Attending related meetings with the Board
- ❖ Fielding inquiries from potential and active candidates
- ❖ Informing all applicants of their status throughout the process
- ❖ Developing an electronic marketing brochure
- ❖ Conducting in-depth background checks of all final candidates
- ❖ Scheduling all interviews, notifying all candidates, and facilitating site/community visit of the selected finalist
- ❖ Drafting interview questions for the Board
- ❖ Providing Board guidance throughout the process
- ❖ Providing an online survey for stakeholder input
- ❖ Conducting Superintendent Compensation Study of districts selected by the Board
- ❖ Assisting negotiation of the new superintendent's employment contract
- ❖ Mentoring services for the new superintendent for one year
- ❖ Facilitating Superintendent Performance Objectives
- ❖ Facilitating one Board/New Superintendent Alignment Workshop
- ❖ Guaranteeing the superintendent selection for two years with a second search conducted for expenses only,

DRAFT CONTRACT

AGREEMENT

Marysville Joint Unified School District and The Cosca Group

THIS AGREEMENT made and entered into this day of , by the Marysville Joint Unified School District, a political subdivision of the State of California (hereinafter "DISTRICT") and The Cosca Group, (hereinafter, "CONSULTANT").

I.

The DISTRICT desires to retain a CONSULTANT to perform special services for the search and recruitment of the superintendent.

II.

CONSULTANT is specially trained, experienced and competent to perform such special services and render such advice.

III.

1. CONSULTANT, upon notice to proceed from the DISTRICT, shall provide to the DISTRICT such special services and advice more particularly set forth in the Proposal, [pages 3-8](#) hereto, which is incorporated by reference herein. CONSULTANT and DISTRICT both agree to be bound by all of the terms and conditions set forth in said Exhibit "A".
2. In consideration of the foregoing, DISTRICT shall pay CONSULTANT A FEE NOT TO EXCEED \$21,624.00. CONSULTANT shall invoice DISTRICT in three installments as follows:
 - (1) \$7,208.00 at the time of the development and presentation of the profile.
 - (2) \$7,208.00 at the presentation of a slate of final candidates.
 - (3) \$7,208.00 at the appointment of the new superintendent.

In addition, if the DISTRICT chooses an upgraded brochure the CONSULTANT will bill the DISTRICT for the actual and necessary expenses of said brochure, to be invoiced separately.

Terms of payment shall be net 45 days.

3. CONSULTANT shall well and faithfully perform each and all of the obligations set forth in the Agreement. CONSULTANT shall at all times be deemed an independent contractor, and neither the CONSULTANT nor any of its employees shall be considered employees of the DISTRICT for any purpose.
4. At all times, CONSULTANT shall work in cooperation with, and pursuant to the direction of the Superintendent of the DISTRICT, or the Superintendent's designee.

5. The DISTRICT shall have the right to terminate this Agreement at any time upon fifteen (15) calendar days' prior written notice. Should the Agreement be terminated, the DISTRICT shall be responsible for payment related to all services provided by the CONSULTANT up to the point of termination.

WHEREFORE, the parties have executed this Agreement on the date first above written:

FOR: Marysville Joint Unified School District

Dated: By: _____
Signature

Name

Title

FOR: THE COSCA GROUP

Dated: By: _____
Frank A. Cosca
President

Dated: By: _____
George H. Bloch
Vice President

2290 La Mer Court
Costa Mesa, CA 92627
Phone: 714-318-1826

Federal I.D. Number: 33-0972414

TESTIMONIALS

"Their process and team leaders have a unique ability to balance driving the process and providing valuable input with listening and engaging the Board . . . "

Board of Education
San Bernardino City Unified School District

" . . . we found our association with The Cosca Group to be a very successful experience."

R. Elizabeth Jaka
Board of Trustee, President
Vista Unified School District

"They demonstrated their extensive experience in superintendent searches along with their strong commitment to perform the work outlined in the proposal . . . "

Frank A. Tarantino, Board President
Sweetwater Union High School District

"Our Board, District and community are thrilled with their professional work. We commend the Cosca Group for the high degree of professionalism and organizational skills demonstrated throughout this process."

Jannie Dutton
President, Board of Trustees
Keppel Union School District

"Very professional behavior with our stakeholders in gathering information about district strengths, challenges, and what they wanted to see in the new superintendent."

Peggy Foster
Board President
Eastside Union School District

"The Woodland Joint Unified School District has used The Cosca Group in two occasions and in both instances they have delivered a highly qualified Superintendent."

Samuel Blanco III
Board President

"Our district and community have nothing but the utmost respect and praise for the work they did for us."

Lucy Rangel
President of the Board
Fillmore Unified School District

"They promised a 'winner' and they delivered."

Brian Clapper
Board President
National School District

"As president of the EUSD school board, and on behalf of the entire board, I highly recommend the services of The Cosca Group as your educational executive search firm."

Martin J. Hranek, Trustee
Escondido Union School District

"They are passionate about education and the importance of getting the right superintendent/district match for the sake of students and staff."

Elisabeth C. Ellers
Board President
South Pasadena Unified School District

"The attention to detail and understanding of our community were tremendous . . . I, on behalf of the Vista Unified School District Board of Trustees, offer our highest recommendation to the company."

Rich Alderson, President
VUSD Board of Trustees
Vista Unified School District

PARTIAL CLIENT LIST

Baldy View Regional Occupational Program

Chino Valley Unified School District

Delhi Unified School District

El Rancho Unified School District

El Segundo City Police Department

Fillmore Unified School District

Hermosa Beach City School District

Keppel Union School District

Laguna Beach Unified School District

Lytle Creek Development Partners

Monrovia Unified School District

Moreno Valley Unified School District

Mountain View-Whisman School District

Novato Unified School District

Orange Unified School District

Paradise Unified School District

Rialto Unified School District

Saint Helena Unified School District

San Gabriel Unified School District (2)

Santee School District

South Pasadena Unified School District

Sulphur Springs School District

Tamalpais Union High School District

Vista Unified School District

Washington Union School District

Windsor Unified School District

Woodland Joint Unified School District (2)

Bonita Unified School District (2)

Culver City Unified School District

Desert Sands Unified School District

El Segundo Chamber of Commerce

Escondido Union School District

Hayward Unified School District

Huntington Beach City School District

King City Unified School District

Livermore Valley Joint Unified School District

Madera Unified School District

Monterey-Peninsula Unified School District

Morgan Hill Unified School District

National City School District

Ocean View School District

Palos Verdes Peninsula Unified School District

Redondo Beach Unified School District

Rocklin Unified School District

San Bernardino Unified School District

San Lorenzo Unified School District (2)

Silver Valley Unified School District

Sweetwater Union High School District

Tahoe Truckee Unified School District

University of Southern California

Washington Unified School District (2)

Waugh School District

Wiseburn School District

Yosemite Unified School District

A Proposal Prepared for

Marysville Joint Unified School District

Marysville, California

for

*The Search and Selection of a
Superintendent of Schools*

submitted in collaboration with



California School Boards Association

by

MCPHERSON *MJ* JACOBSON, LLC

EXECUTIVE RECRUITMENT & DEVELOPMENT



Phone: 888-375-4814
Email: mail@macnjake.com
Website: www.macnjake.com



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



888-375-4814 ♦ Email: mail@macnjake.com ♦ Website: www.macnjake.com

May 19, 2021

Board of Trustees
Marysville Joint Unified School District
1919 B Street
Marysville, California 95901

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 Marysville Joint Unified 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.

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,

Thomas Jacobson

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

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05/21

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.

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. 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, **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.

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

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

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

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

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

Applicant Diversity

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

McPherson & Jacobson has **over 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.

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

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

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

Search Process

Executive Summary

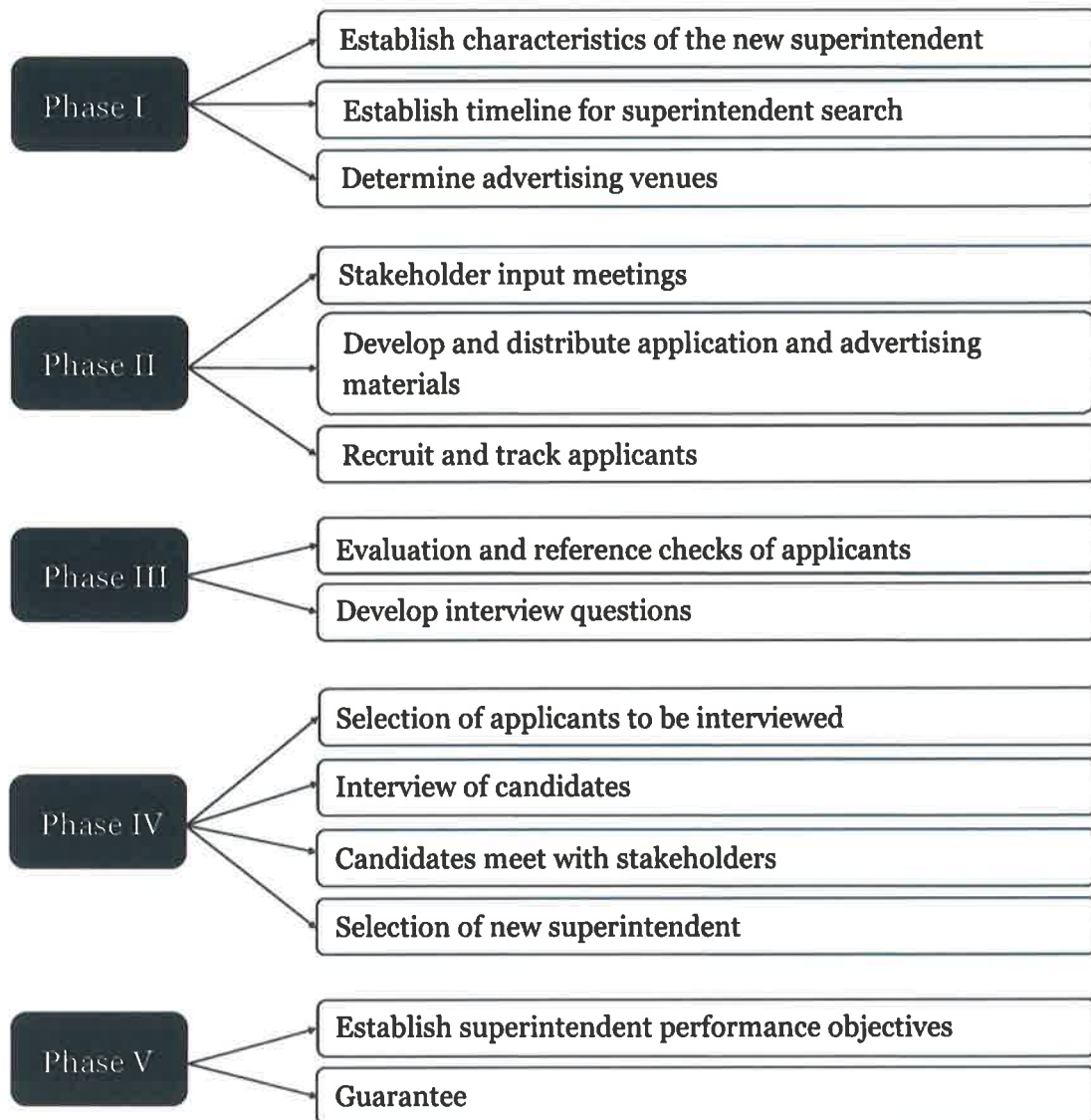
McPherson & Jacobson L.L.C. provides a comprehensive search process. Below are some of the highlights of our process:

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

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

180

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.

✓ **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.

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✓ **Conduct background checks.**

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

Phase V—Transition with Success

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

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

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

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

✓ **Provide a guarantee.**

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

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

Timeline

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

Search sequence:

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

*Responsibilities of Marysville Joint Unified School District
and McPherson & Jacobson, L.L.C.*

Event	McPherson & Jacobson's Tasks	School District's Tasks
1 st board meeting	<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 	<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	<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	<input type="checkbox"/> Edit the brochure
During application period	<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	<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

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Event	McPherson & Jacobson's Tasks	School District's Tasks
Stakeholder meetings are scheduled	<input type="checkbox"/> Home Office sends out invitations to the community stakeholder meeting(s) after receiving the information from the consultant and the district	<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	<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	<input type="checkbox"/> Link to online stakeholder input form(s) is (are) posted on the school district website
Stakeholder meetings completed	<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	<input type="checkbox"/> "Stakeholder Input Report" is posted on the school district website
2 nd board meeting	<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	<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"> o Review of the list of all applicants o Overview of candidates on short list o Selection of finalists o Finalizing of interview dates & schedule o Review of interview questions & procedures o 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 	<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 	<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"/> 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 	<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

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.

Cost Proposal

Investment

The not to exceed amount for conducting an online superintendent search is \$20,050.*

Included in this amount is:

- Phases I-V of the superintendent search process
- Four (4) weeks of print advertising in EdCal (40-word ad)
- Sixty (60) days of advertising on EdJoin
- Online stakeholder meetings
- Online stakeholder input surveys
- Video interviews of 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 is willing to submit a not to exceed amount for consultant travel.*

NOTE:

- Expenses may increase if the district chooses additional media advertising.
- 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.

Guarantee:

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

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

Additional Services:

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

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

Additional Information

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

*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

Linden Unified School District, Linden
Search Year: 2020/21, Enrollment: 2,300

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

San Mateo-Foster City School District, Foster City
Search Year: 2020/21, Enrollment: 11,000

Santa Barbara Unified School District, Santa Barbara
Search Year: 2019/20, Enrollment: 15,000

Santa Paula Unifued School District, Santa Paula
Search Year: 2020/21, Enrollment: 5,200

Santa Ynez Valley Union High School District, Santa Ynez
Search Year: 2020/21, Enrollment: 850

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: 2020/21, Enrollment: 5,000

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

Vallecito Union School District, Avery
Search Year: 2020/21, Enrollment: 600

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

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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.

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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**

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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

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BOARD OF EDUCATION

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

SUPERINTENDENT

Jeffrey L. Baarstad, Ph.D.



June 3, 2015

To Whom It May Concern:

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

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

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

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

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

Betsy Connolly DVM

Phone: 805.497.9511

www.conejousd.org

info@conejousd.org

1400 East Janss Road

Thousand Oaks, CA 91362

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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

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MJUSD

Expanded Learning 2021-2023 ELO grant Plan





Expanded Learning Opportunities Grant

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- AB 86 Provides \$4.6 billion to LEAs to improve academic achievement by offering supplemental instruction and support to students
 - \$1,000 for each homeless student
 - The rest distributed in proportion to LCFF entitlement
- Shall implement a learning recovery program that, at a minimum, provides to designated student groups:
 - Supplemental instruction
 - Support for social and emotional well-being
 - Meals and snacks
- Must use at least 85% for in-person services
- Must use at least 10% to hire paraprofessionals





Learning Loss Mitigation Fund—Allowable Uses

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Additional Academic Services

Diagnostic assessments of pupil learning needs, intensive instruction for addressing gaps in core academic skills, additional instructional materials, or technology for in-classroom and distance learning

Integrated Pupil Supports

To address other barriers to learning, such as mental health services, professional development to help with distance learning, access to school meals, or programs to address pupil trauma and social-emotional learning

Learning Loss

Addressing learning loss or accelerating progress to close learning gaps through learning supports and intensive instruction

Increase Instructional Time

Extend the instructional school year, or increase instructional minutes each week or school day

Health and Safety

COVID-19 testing, personal protective equipment, supplies to clean and sanitize





ESSER III—Additional Details

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LEAs must use at least 20% of ESSER III funds to address learning loss

“ . . . to address learning loss through the implementation of evidence-based interventions, such as summer learning or summer enrichment, extended day, comprehensive afterschool programs, or extended school year programs, and ensure that such interventions respond to students’ academic, social, and emotional needs and address the disproportionate impact of the coronavirus on [underrepresented student groups]”

Plan for safe return to in-person instruction

An LEA that receives ESSER III funds must, within 30 days of receiving the funds, make publicly available on its website a plan for the safe return to in-person instruction and continuity of services. Before making the plan publicly available, the LEA must seek public comment on the plan.

3 Phases of expanded learning

1. Summer School 2020-2021
2. Expanded learning opportunities 2021-2022
3. Summer School 2022-2023
4. What interventions worked?
5. How do we maintain after funding ends?

What is the Extended Learning Grant?



Phase 1



Summer school this summer and next summer

This summer is focused on intervention and re-engagement through SEL and hands on activities at the TK-8 level and credit remediation at the High School.
(June 14th - July 2nd)

Next summer's programming will be determined based on educational data collected internally during the first semester of the 2021-2022 school year.

Phase 2



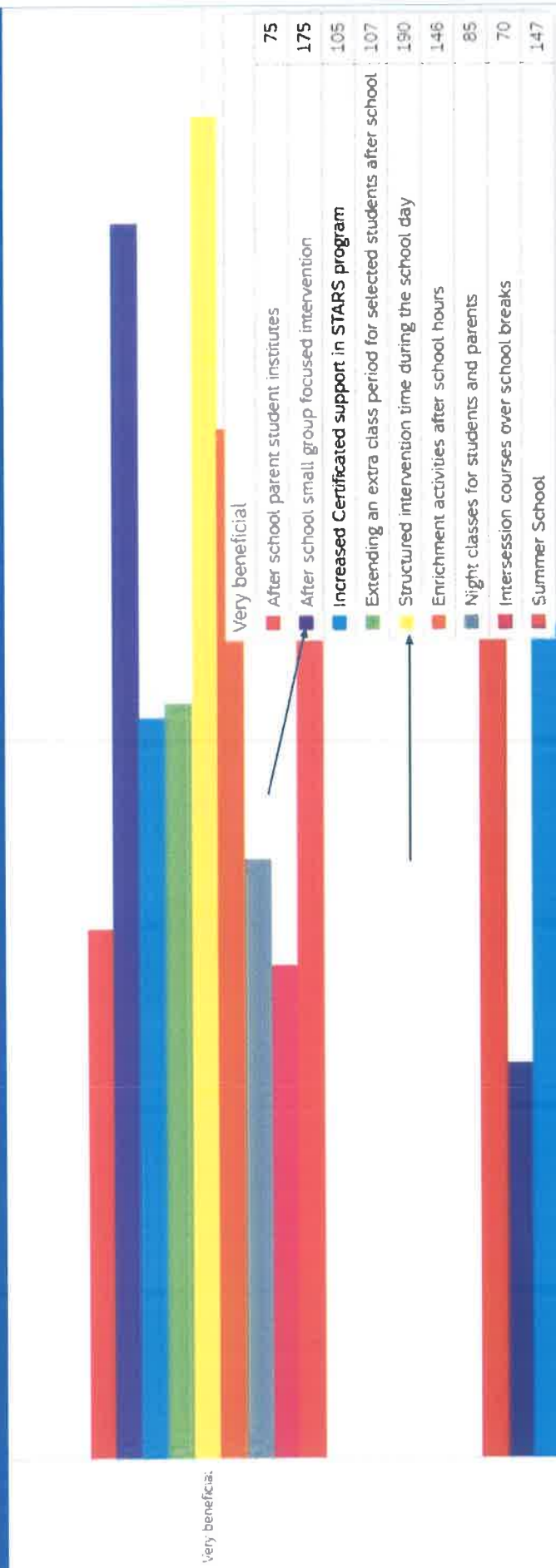
Expanded learning options for next year were discussed with site admin, MUTA, and then through survey to our staff. Options based on conversations with MUTA and administration were provided for feedback. 284 teachers responded to the survey of these ideas.

Based on teacher input, students and families were surveyed. 668 more responses were gathered.

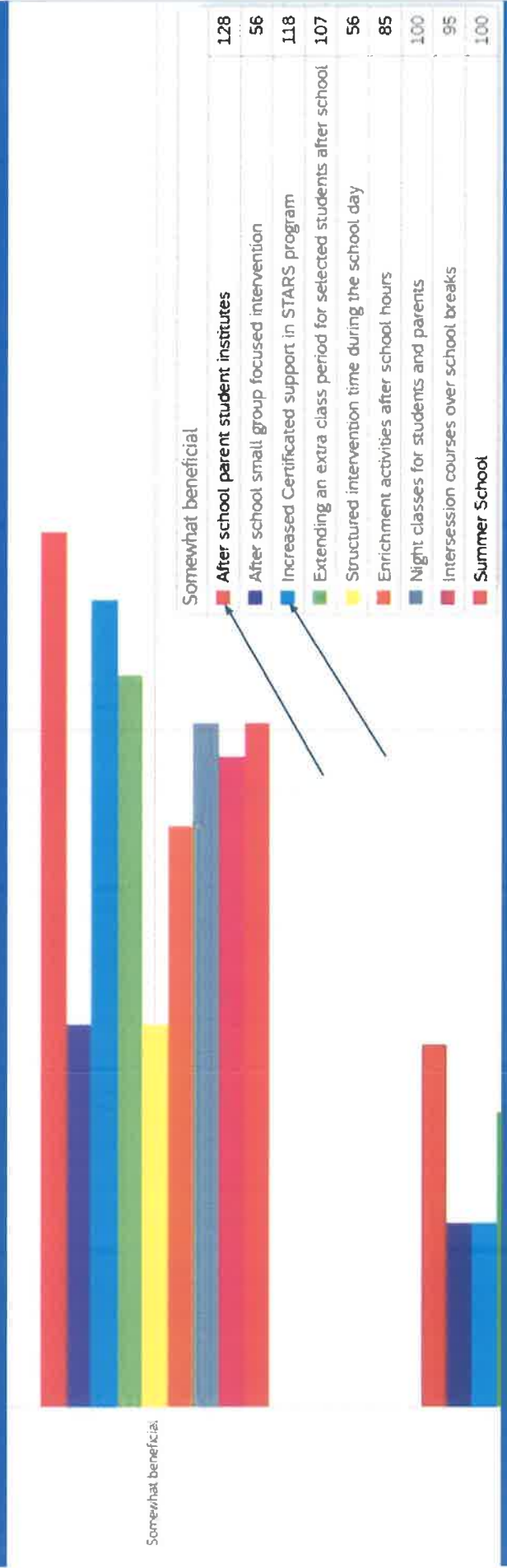
This is initial work and we will continue to create options.

This plan is not auditable and is flexible, CDE recognizes the plan will continue to adjust as planning and implementation continue.

Items teachers found very beneficial

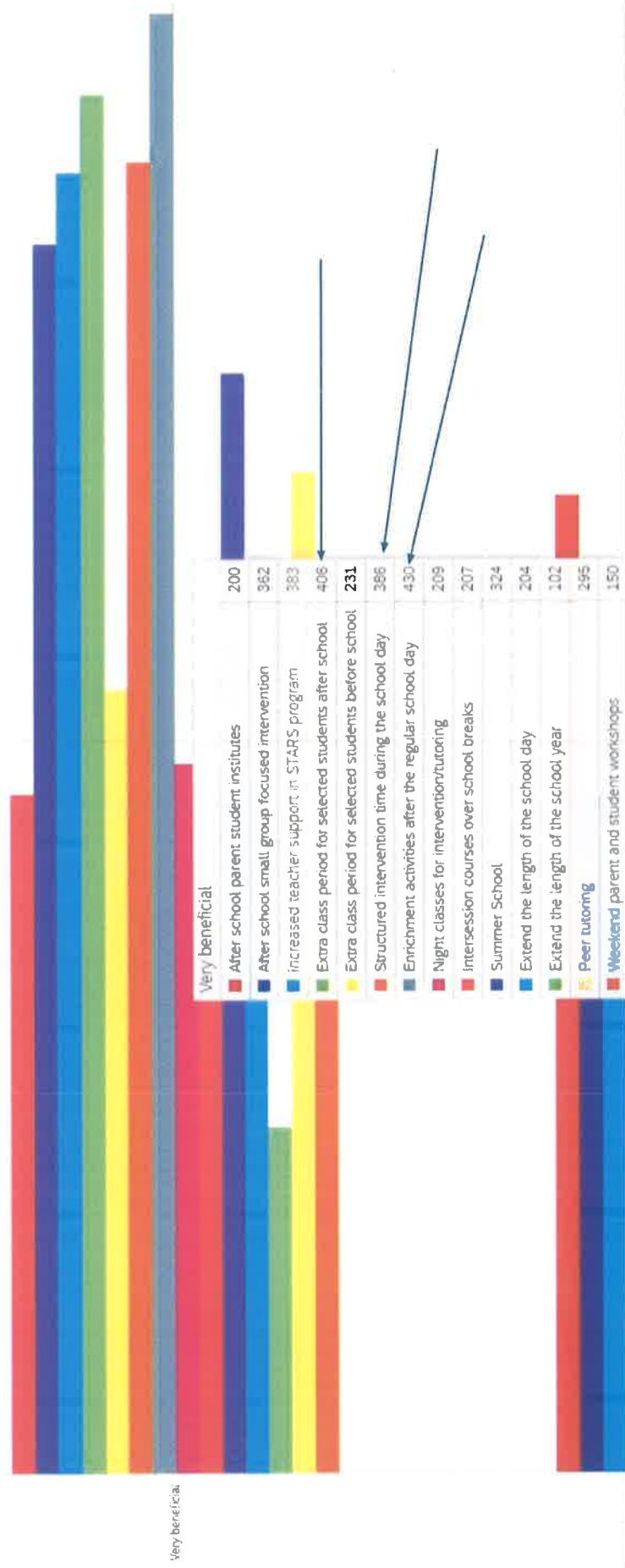


Items teachers found somewhat beneficial

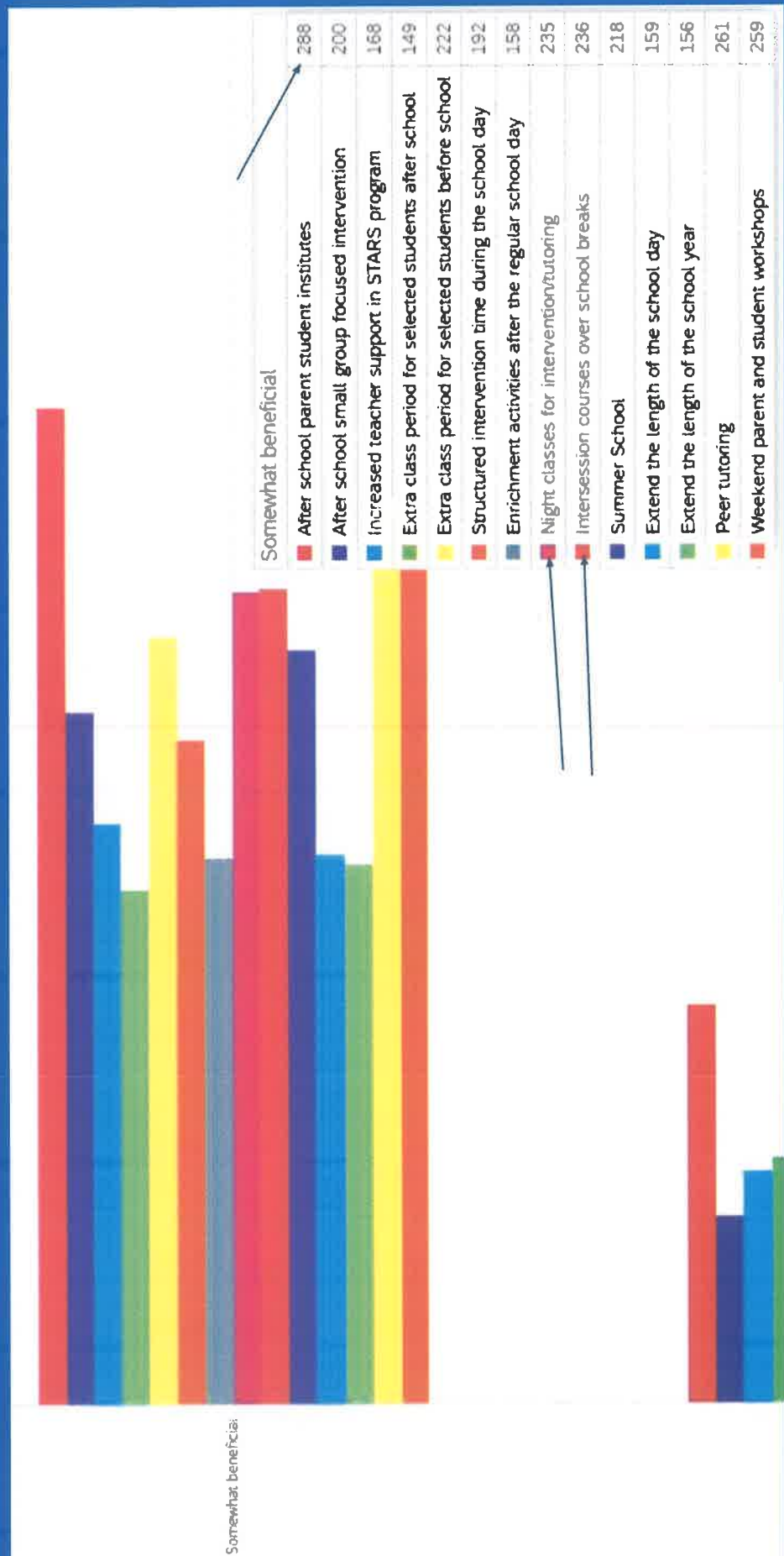


intervention
school
teacher
period
student
group
time
day
program
class
support
beneficial
grade
days
wide
parent
paras
full
learning
academic
extra
attend
district
small
high
back
staff
enrich
campus
instruction
work
level
helpful
opportunity
tutor
site
kid
hour

Items Parents and students found very beneficial



Items Parents and students found somewhat beneficial



workshop
grade activity make
support day
time
class
learning
elementary
field normal
behind
enrich
club
year
none
parent
kid
school
student
teacher
tutor
extra
sports
back
option
don't
focus
mask
hour
work
program
beneficial
children
days
feel



Expanded Learning Opportunities Grant—Allowable Uses

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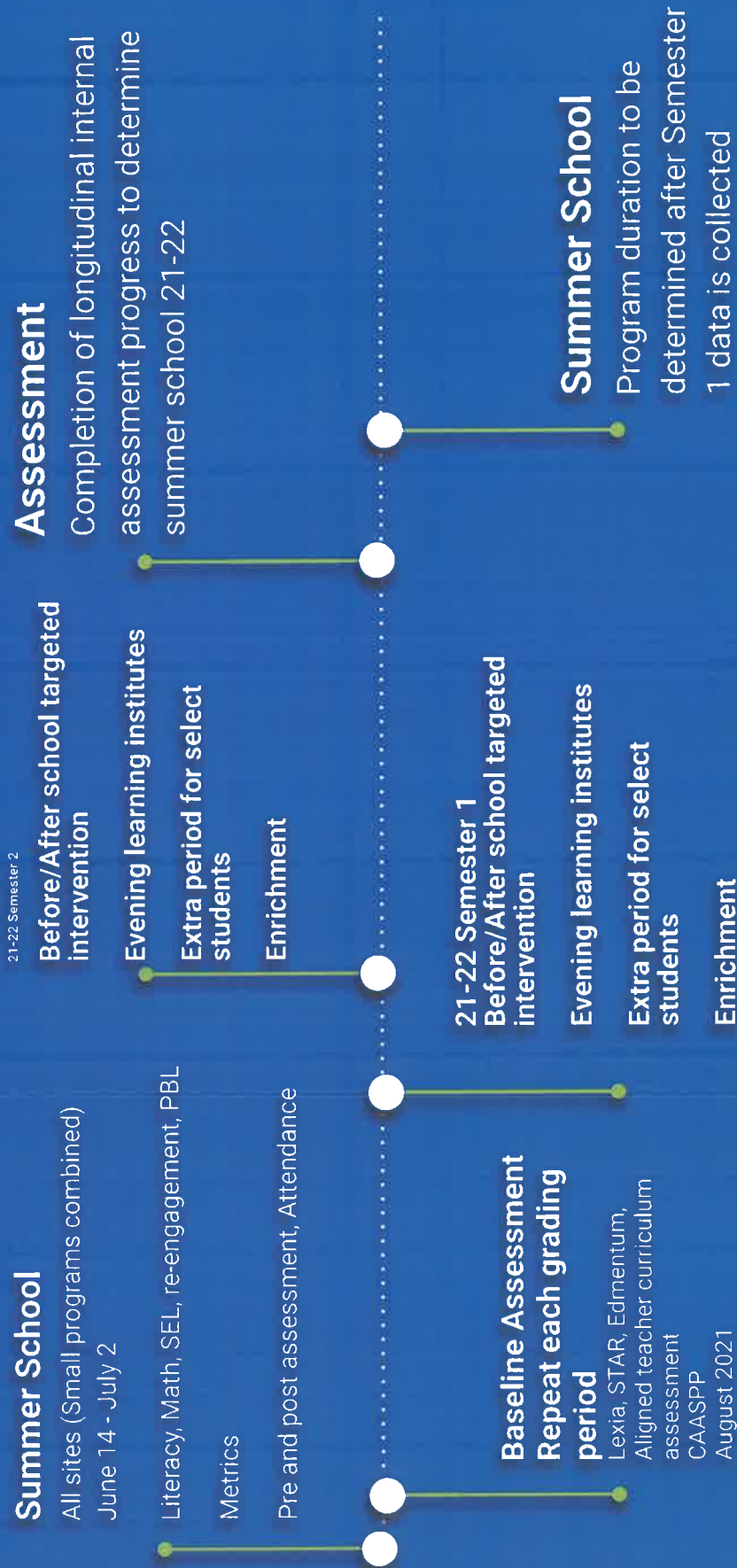


Combined plan

\$7 million

1. Summer school 2021 & 2022 (\$2 million allocated)
2. After school courses (\$1,500,000)
3. Teachers and increased intervention through STARS program (\$250,000)
4. Targeted Intervention/Tutoring before and after school (\$1,000,000)
5. Para-educators (\$1,000,000, exceeds 10% by 200,000)
6. After intervention transportation (\$1,000,000)
7. Parent/student academies (\$250,000)
8. Focus on enrichment to offset remediation (\$250,000)
9. Formative assessment measuring progress (Covered in LCAP S and C)
10. Survey to measure SEL progress (Covered in LCAP S and C)

Implementation timeline





Thank you!



Expanded Learning Opportunities Grant Plan

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Marysville Joint Unified School District	Gary Cena Superintendent	gcena@mjUSD.com (530) 749-6102

The following is the local educational agency's (LEA's) plan for providing supplemental instruction and support to students, including those identified as needing academic, social-emotional, and other supports, including the provision of meals and snacks. The plan will explain how the LEA will use the funds it receives through the Expanded Learning Opportunities (ELO) Grant to implement a learning recovery program for at least the students included in one or more of the following groups: low-income students, English learners, foster youth, homeless students, students with disabilities, students at risk of abuse, neglect, or exploitation, disengaged students, and students who are below grade level, including, but not limited to, those who did not enroll in kindergarten in the 2020–21 school year, credit-deficient students, high school students at risk of not graduating, and other students identified by certificated staff.

For specific requirements please refer to the Expanded Learning Opportunities Grant Plan Instructions.

Plan Descriptions

A description of how parents, teachers, and school staff were involved in the development of the plan.

There are several layers in the MJUSD extended learning plan to be implemented for the duration of the funding opportunity. Summer school 2020-2021, Expanded learning and remediation opportunities in the 2021-2022 school year and then summer school again in 2022. For the 2021 Summer school program, after talking with families via site survey and weighing transportation availability, we would need summer school to be as proximal as possible to get students to be able to attend. After this decision to run 23 separate school specific summer schools, we needed to determine staff availability. Interest was very low amongst our staff to work this summer. To that affect initial survey of families illustrated that family desire for summer school would outweigh staffing availability at many sites. Sites then began to work with staff to determine who was willing to commit to an abbreviated summer bridge program focused in remediation and social emotional loss for 3 weeks. The abbreviated program seemed to be the best fit for the community and staff willingness to work and learn this summer. In conjunction with this online remediation programs will be made available to all families outside of the on campus summer school programs to continue to access reading and math remediation across the summer. Students that are wanting to do this will be allowed to keep their chromebooks to maintain access. District staff will assure support and programs remain available for families over the summer. Next for the

summer school portion of the program we used internal assessment data, academic achievement, attendance and engagement records as well as STAR, LEXIA and curriculum based teacher assessment to determine priority placement in summer school. The parents asked for a balance of SEL and learning loss remediation and the teachers also believe this is best practice to focus on academic re-engagement. This matches recommendations from CDE, CTA and ACSA. Families were then invited to summer school based on ranked priority of needs based on the internal data. For the expanded options next year, teachers, admin as well as students and families were surveyed to determine which options would be best utilized in the coming school year.

A description of how students will be identified and the needs of students will be assessed.

Internal district data was relied upon in several modes to determine student academic and social emotional needs. The data generated by our teachers is the most critical as they know their students engagement and progress. While learning loss and academic data for the elementary schools was important in this decision, social emotional factors of engagement during distance learning were also considered. The focus on this was not only for the student current emotional needs, but also to help re-engage them through the process of a hands on, fun summer school program. The internal academic data used at the elementary sites was several sources. Lexia and waterford were used for our TK-2 students to determine literacy levels. For all elementary students we are utilizing renaissance/STAR ELA and Math assessment data in conjunction with internal curriculum assessment data to determine academic need based to learning loss. For SEL, the students engagement logs and records along with attendance and participation in activities were considered alongside the students unduplicated status. Once determined, elementary students received a golden ticket and invitation to our summer bridge programs. For the secondary sites the focus was based more on credit remediation, primarily focused with priority on graduating seniors that had created a deficit in credits. Next priority was given to Juniors that could get back on track with an abbreviated summer program, remediating courses they had failed, but not allowing new courses to be taken in order to focus on filling gaps in learning, especially in building areas such as math and ELA. Finally if space permits Freshman who received very little in person instruction will be enrolled in order to connect them to the school in a way that was not able to happen this school year. Continuation summer school was determined in the same fashion, less the 9th grade component. For the Middle school students priority was given to the 8th grade students who are not set to promote, as well as a group of students that will be entering into the dual enrollment college program. This new rigorous program is part of our new message to students to accelerate and create more equitable options for all students. For the 2021-2022 school year, formative ongoing assessment data will be used, alongside family ability to support attendance outside of school hours, to enroll students in specific expanded class, intervention and enrichment opportunities. The summer school in 2022 will be similar to this summers school program. Program adjustments will be made again by available internal monitoring data.

A description of how parents and guardians of students will be informed of the opportunities for supplemental instruction and support.

For the summer school portion, families have been surveyed and invited individually. During these invitations the reason for the need to have their student in summer school is explained as it related to our academic and SEL indicative data from the year. For next year we are working on either the addition of a period to the secondary schedule for students in need outside of the regular day, as well as designated pull out intervention time that will be structured into the standard school day. School counseling and administrative staff will communicate for next year on how to access additional before and after school standards based remediation. This remediation will come in several forms. First credit remediation in order to assure timely cohort graduation and A-G completion through Edmentum. The second purpose will be to use prescriptive learning loss tools (Exact Path) in order to find not just learning loss of standards in an educational pathway due to COVID but previous gaps. The intent of this remediation is to fill in gaps to bring students to a point where they can do A-G level coursework. At the elementary sites similar learning loss tutoring and intervention will be based in Literacy and Math skills. As dates and times for specific

programming are created throughout next year, site staff, including newly added parent liaisons will work to identify, notify and assure availability of expanded learning opportunities.

A description of the LEA's plan to provide supplemental instruction and support.

Ongoing conversations with stakeholders have yielded several initial plans for support during the next school year, as well as planning into the future. For elementary sites MJUSD is balancing funding between the ability to hold after school academies for students and parents in order to gain academic momentum through increased understanding and support between the school, home and student. The ability to offer targeted intervention after hours, weekends and before school based on the need for remediation as seen in our academic data will allow us to create targeted programs. In conjunction with the addition of adaptive learning loss from the 2020-2021 school year. For the secondary sites the increase para support in the classrooms MJUSD aims to eliminate learning loss from the 2020-2021 school year. For the secondary sites the ability to offer extended credit remediation through Edmentum as well as before/after school academies and targeted intervention opportunities aim to support student achievement through intervention with certificated staff. MJUSD is also looking to add para-educators to Math classrooms to allow for increased intervention and differentiation of instruction. If staff is available offering courses across student non attendance breaks and evenings are also being explored.

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Expenditure Plan

The following table provides the LEA's expenditure plan for how it will use ELO Grant funds to support the supplemental instruction and support strategies being implemented by the LEA.

Supplemental Instruction and Support Strategies	Planned Expenditures	Actual Expenditures
Extending instructional learning time	3,000,000	
Accelerating progress to close learning gaps through the implementation, expansion, or enhancement of learning supports	500,000	
Integrated student supports to address other barriers to learning	500,000	
Community learning hubs that provide students with access to technology, high-speed internet, and other academic supports	1,000,000	

Supplemental Instruction and Support Strategies	Planned Expenditures	Actual Expenditures
Supports for credit deficient students to complete graduation or grade promotion requirements and to increase or improve students' college eligibility	500,000	
Additional academic services for students	500,000	
Training for school staff on strategies to engage students and families in addressing students' social-emotional health and academic needs	1,000,000	
Total Funds to implement the Strategies	7,000,000	

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A description of how ELO Grant funds are being coordinated with other federal Elementary and Secondary School Emergency Relief Funds received by the LEA.

Funds generated by Assembly Bill (AB) 86, the In-Person-Instruction and Expanded Learning Opportunity Grants are in addition to three rounds of federal stimulus funds. These one-time funds have created the opportunity to identify resources which address the challenges of both reopening schools and the need for learning loss mitigation. The District is planning to use the ELO Grant to fund a district-wide summer school program at 22 of the district's 23 school sites for three weeks during summer 2021. Other COVID funds such as the Elementary & Secondary School Emergency Relief (ESSER) I and II and the Governor's Emergency Education Relief (GEER) are providing other essential resources necessary to improve student achievement. These resources include the following examples: personal protective equipment, access to water while not using water fountains, barriers to provide social distancing, sanitation equipment and supplies, technology upgrades to support wifi access, chromebooks for students and computers for staff members. In addition to operational needs provided by other COVID funds, instructional needs have been and continue to be addressed with professional development for teachers in a variety of areas for which the pandemic has created the need. These professional development areas include Technology platforms, digital pedagogy, SEL, supporting EL learners, and supplemental learning loss products . The District understands the need, and is continually improving its plan, for the use of COVID funds to develop a student-centric coherence, determine expected impacts, outcomes and measurements. The District's plans are the result of communication and input from stakeholders to develop a concept that is a clear theory of action as seen in the Learning Continuity Plan and the soon to be adopted Local Control and Accountability Plan (LCAP).

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Expanded Learning Opportunities Grant Plan Instructions: Introduction

The Expanded Learning Opportunities Grant Plan must be completed by school districts, county offices of education, or charter schools, collectively referred to as Local Educational Agencies (LEAs), that receive Expanded Learning Opportunities (ELO) Grant funds under California Education Code (EC) Section 43521(b). The plan must be adopted by the local governing board or body of the LEA at a public meeting on or before June 1, 2021, and must be submitted to the county office of education, the California Department of Education, or the chartering authority within five days of adoption, as applicable. The plan must be updated to include the actual expenditures by December 1, 2022.

For technical assistance related to the completion of the Expanded Learning Opportunities Grant Plan, please contact ELOGGrants@cde.ca.gov, <mailto:lcff@cde.ca.gov>

Instructions: Plan Requirements

An LEA receiving ELO Grant funds under EC Section 43521(b) is required to implement a learning recovery program that, at a minimum, provides supplemental instruction, support for social and emotional well-being, and, to the maximum extent permissible under the guidelines of the United States Department of Agriculture, meals and snacks to, at a minimum, students who are included in one or more of the following groups:

- low-income,
- English learners,
- foster youth,
- homeless students,
- students with disabilities,
- students at risk of abuse, neglect, or exploitation,
- disengaged students, and
- students who are below grade level, including, but not limited to, those who did not enroll in kindergarten in the 2020–21 school year, credit-deficient students, high school students at risk of not graduating, and other students identified by certificated staff.

For purposes of this requirement

- “Supplemental instruction” means the instructional programs provided in addition to and complementary to the LEAs regular instructional programs, including services provided in accordance with an individualized education program (IEP).
- “Support” means interventions provided as a supplement to those regularly provided by the LEA, including services provided in accordance with an IEP, that are designed to meet students’ needs for behavioral, social, emotional, and other integrated student supports, in order to enable students to engage in, and benefit from, the supplemental instruction being provided.
- “Students at risk of abuse, neglect, or exploitation” means students who are identified as being at risk of abuse, neglect, or exploitation in a written referral from a legal, medical, or social service agency, or emergency shelter.

EC Section 43522(b) identifies the seven supplemental instruction and support strategies listed below as the strategies that may be supported with ELO Grant funds and requires the LEA to use the funding only for any of these purposes. LEAs are not required to implement each supplemental instruction and support strategy; rather LEAs are to work collaboratively with their community partners to identify the

supplemental instruction and support strategies that will be implemented. LEAs are encouraged to engage, plan, and collaborate on program operation with community partners and expanded learning programs, and to leverage existing behavioral health partnerships and Medi-Cal billing options in the design and implementation of the supplemental instruction and support strategies being provided (*EC* Section 43522[h]).

The seven supplemental instruction and support strategies are:

1. Extending instructional learning time in addition to what is required for the school year by increasing the number of instructional days or minutes provided during the school year, providing summer school or intersessional instructional programs, or taking any other action that increases the amount of instructional time or services provided to students based on their learning needs.
2. Accelerating progress to close learning gaps through the implementation, expansion, or enhancement of learning supports including, but not limited to, any of the following:
 - a. Tutoring or other one-on-one or small group learning supports provided by certificated or classified staff.
 - b. Learning recovery programs and materials designed to accelerate student academic proficiency or English language proficiency, or both.
 - c. Educator training, for both certificated and classified staff, in accelerated learning strategies and effectively addressing learning gaps, including training in facilitating quality and engaging learning opportunities for all students.
3. Integrated student supports to address other barriers to learning, such as the provision of health, counseling, or mental health services, access to school meal programs, before and after school programs, or programs to address student trauma and social-emotional learning, or referrals for support for family or student needs.
4. Community learning hubs that provide students with access to technology, high-speed internet, and other academic supports.
5. Supports for credit deficient students to complete graduation or grade promotion requirements and to increase or improve students' college eligibility.
6. Additional academic services for students, such as diagnostic, progress monitoring, and benchmark assessments of student learning.
7. Training for school staff on strategies, including trauma-informed practices, to engage students and families in addressing students' social-emotional health needs and academic needs.

As a reminder, *EC* Section 43522(g) requires that all services delivered to students with disabilities be delivered in accordance with an applicable IEP.

Fiscal Requirements

The following fiscal requirements are requirements of the ELO grant, but they are not addressed in this plan. Adherence to these requirements will be monitored through the annual audit process.

- The LEA must use at least 85 percent (85%) of its apportionment for expenditures related to providing in-person services in any of the seven purposes described above.
- The LEA must use at least 10 percent (10%) of the funding that is received based on LCFF entitlement to hire paraprofessionals to provide supplemental instruction and support through the duration of this program, with a priority for full-time paraprofessionals. The supplemental instruction and support provided by the paraprofessionals must be prioritized for English learners and students with disabilities. Funds expended to hire paraprofessionals count towards the LEAs requirement to spend at least 85% of its apportionment to provide in-person services.

- An LEA may use up to 15 percent (15%) of its apportionment to increase or improve services for students participating in distance learning or to support activities intended to prepare the LEA for in-person instruction, before in-person instructional services are offered.

Instructions: Plan Descriptions

Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broad understanding among the LEA's local community.

A description of how parents, teachers, and school staff were involved in the development of the plan

Describe the process used by the LEA to involve, at a minimum, parents, teachers, and school staff in the development of the Expanded Learning Opportunities Grant Plan, including how the LEA and its community identified the seven supplemental instruction and support strategies that will be implemented. LEAs are encouraged to engage with community partners, expanded learning programs, and existing behavioral health partnerships in the design of the plan.

A description of how parents and guardians of students will be informed of the opportunities for supplemental instruction and support.

Describe the LEA's plan for informing the parents and guardians of students identified as needing supplemental instruction and support of the availability of these opportunities, including an explanation of how the LEA will provide this information in the parents' and guardians' primary languages, as applicable.

A description of how students will be identified and the needs of students will be assessed

Describe the LEA's plan for identifying students in need of academic, social-emotional, and other integrated student supports, including the LEA's plan for assessing the needs of those students on a regular basis. The LEA's plan for assessing the academic needs of its students may include the use of diagnostic and formative assessments.

As noted above in the Plan Requirements, "other integrated student supports" are any supports intended to address barriers to learning, such as the provision of health, counseling, or mental health services, access to school meal programs, before and after school programs, or programs to address student trauma and social-emotional learning, or referrals for support for family or student needs.

A description of the LEA's plan to provide supplemental instruction and support

Describe the LEA's plan for how it will provide supplemental instruction and support to identified students in the seven strategy areas defined in the Plan Requirements section. As a reminder, the LEA is not required to implement each of the seven strategies; rather the LEA will to work collaboratively with its community to identify the strategies that will be implemented. The plan must include a description of how supplemental instruction and support will be provided in a tiered framework that bases universal, targeted, and intensive supports on students' needs for academic, social-emotional, and other integrated student supports. The plan must also include a description of how the services will be provided through a program of engaging learning experiences in a positive school climate.

As a reminder, *EC* Section 43522(g) requires that all services delivered to students with disabilities be delivered in accordance with an applicable individualized education program. Additionally, LEAs are encouraged to collaborate with community partners and expanded learning programs, and to leverage existing behavioral health partnerships and Medi-Cal billing options in the implementation of, this plan (*EC* Section 43522[h]).

Instructions: Expenditure Plan

The 'Supplemental Instruction and Support Strategies' column of the Expenditure Plan data entry table lists the seven supplemental instruction and support strategies that may be supported with ELO Grant funds.

Complete the Expenditure Plan data entry table as follows:

In the 'Planned Expenditures' column of the data entry table, specify the amount of ELO Grant funds being budgeted to support each supplemental instruction and support strategies being implemented by the LEA and the total of all ELO Grant funds being budgeted.

The plan must be updated to include the actual expenditures by December 1, 2022. In the 'Actual Expenditures' column of the data entry table the LEA will report the amount of ELO Grant funds that the LEA actually expended in support of the strategies that it implemented, as well as the total ELO Grant funds expended.

A description of how these funds are being coordinated with other federal Elementary and Secondary School Emergency Relief Funds received by the LEA

Describe how the LEA is coordinating its ELO Grant funds with funds received from the federal Elementary and Secondary School Emergency Relief (ESSER) Fund provided through the federal Coronavirus Response and Relief Supplemental Appropriations Act of 2021 (Public Law 116-260), also known as ESSER II, to maximize support for students and staff.

California Department of Education
March 2021

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