



**Proposal to Conduct a
Superintendent Search
for**



March 7, 2019

 **TABLE OF CONTENTS**

Proposal Letter..... 1-2

Addendum, Supplemental RFP Responses..... 3

Executive Summary 4

Search Process Plan..... 5-6

Search Process Flow Chart 7

Proposed Timeline 8

Cost Proposal..... 9

Sample Contract 10

Sample Reports (Advertisements, Reports, Survey) 11-23

References..... 24

Qualification Statement 25-31

- Experience and Qualifications of the Firm 25
- Qualifications of Lead Consultants 25-26
- Qualifications of Supporting Consultants 26-29
- Resumes of Lead Consultants..... 30-31

Leadership Associates Search List..... 32-34

Commendations 35-36

Supplemental RFP Forms 37-41

Search Firm and Consultant Contact Information



Lead Consultants

Eric Andrew, Ed.D.
408.761.9199
eandrew@leadershipassociates.org

Juan Garza
559.351.6672
jgarza@leadershipassociates.org

Leadership Associates

3905 State Street #7-407
Santa Barbara, CA 93105
www.leadershipassociates.org

Becky Banning
Executive Assistant
805.364.2775
bbanning@leadershipassociates.org



3905 STATE STREET, #7-407
SANTA BARBARA, CALIFORNIA 93105
(805) 364-2775
WWW.LEADERSHIPASSOCIATES.ORG

ERIC ANDREW ♦ KENT BECHLER ♦ JAMES BROWN ♦ MARC ECKER ♦ RICHARD FISCHER ♦ SALLY FRAZIER ♦ JUAN GARZA ♦ PEGGY LYNCH ♦ MIKE MILLER ♦ PHIL QUON ♦ DENNIS SMITH ♦ RICH THOME ♦ SANDY THORSTENSON ♦ DAVID VERDUGO

March 3, 2019

Mialisa Bonta
President, Board of Education
Alameda Unified School District
2060 Challenger Drive
Alameda, CA 94501

Dear President Bonta and Alameda Unified School District Board of Education:

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. We have completed more than 385 searches for California school boards since that time. More than 84% of the superintendents selected have remained in their positions 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 work includes partnering with Boards in several similar and/or nearby districts such as Modesto City Schools, Emery Unified, and Vallejo City Unified. Through the continued participation of several of our partners in education organizations such as the California Collaborative for District Reform, 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.

In considering the uniqueness of Alameda Unified School District, we are aware and respectful of the District's accomplishments and priorities:

- The community supports the district as evidenced by the passage of parcel taxes and bond measure approval.



- AUSD schools have received state and national recognition for their efforts in closing the achievement gap.
- AUSD is a diverse, inclusive community of educators where students receive a rigorous academic education
- The district prepares students for college and career success by offering a variety of educational programs.
- The Green Schools program inspires and promotes environmental literacy.

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.

If our firm is selected, Mr. Juan Garza 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 Alameda Unified School District.

Respectfully,

A handwritten signature in blue ink, appearing to read 'Eric Andrew'.

Eric Andrew, Ed.D.,
Consultant, Leadership Associates

A handwritten signature in blue ink, appearing to read 'Juan Garza'.

Juan Garza,
Consultant, Leadership Associates

Please see attached addendum containing supplemental responses to the RFP.

ADDENDUM, SUPPLEMENTAL RFP RESPONSES

Superintendent Search

Proposal Requirements

1. **Detailed description of the process and all associated costs in an itemized format** (See *Cost Proposal and Sample Contract*)
2. **Timeline for Process** (see *Proposed Timeline*)
3. **Services:**
 - 3.1 Development of a hiring profile (See *Search Process Plan, Phases 1- 3*)
 - 3.2 & 3 National advertisement and recruitment (See *Search Process Plan, Phase 4*)
 - 3.4 Assist the Board with the applicant screening process (See *Search Process Plan, Phase 5*)
 - 3.5. Assist the Board with the interview process (See *Search Process Plan, Phase 6*)
 - 3.7 Solicit community input to inform the hiring profile (See *Search Process Plan, Phases 1-3*)
4. **Management of a community interview panel** - At the request of the Board, the consultants will organize a panel consisting of various stakeholder group representatives. The consultants will offer stakeholders who are typically invited to be a part of the process and add those suggested from the Board members. We will use specific tools such as the attached form, to gather information from the panel for the Board's consideration. The consultants will also provide suggested interview questions to be used by the panel and make adjustments based on input from the Board. (See attached *Rubric Form Sample*).
5. **Procedure consultant will use to disclose prior recruiting/searches involving any candidate that is screened** - The consultants will provide a thorough reference check when presenting all the candidates, which will include informing the Board about prior recruiting (if any), and whether the applicant has applied in other recent searches.
6. **Samples of related materials / Reports** (See *Sample Reports*)
7. **Experience References:**
 - 7.1 Background about firm - See *Proposal Letter and Executive Summary*)
 - 7.2 Searches conducted; average length of time candidates remain on the job (See *Searches, 2013-Current; and Proposal Letter*)
 - 7.3 Resumes (See *Qualification Statement and Resumes*)
 - 7.4 Names and addresses of three past or current clients (See *References*)
8. **Guarantee** (See *Cost Proposal*)

Other Pertinent Data - Cost savings suggestions, communication plans - There is a plan of communication provided to the District's liaison, which is usually the executive assistant to the superintendent. Guidelines for the entire search process including samples of schedules, agenda language, and invitation letters to stakeholder engagement sessions are provided. Additionally the consultants will discuss the Board/Consultant communication plan in detail during their initial meeting with the Board.



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 385 searches in California we have developed processes that lead to the successful hiring of superintendents, and other education executives, 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. We provide this outline to give you an overview, but also for your reference so you know what we are doing on your behalf throughout the search and particularly in the periods of time between our meetings with you.

(*Indicates meetings with the Board)

Phase 1: *Initial Meeting with the Board

Leadership Associates will meet 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; the final 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

After working with the Board to develop a community engagement plan, we meet 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

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

After our meetings 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

At this 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

The Board conducts the interviews 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: Visit to the Finalist's District and Contract

The purpose of the visit is to validate the Board's choice prior to the official contract offer. The Board will determine who will go on the visit; the consultants will not participate in the visit. We 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 the New Superintendent

Following the validation visit, 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

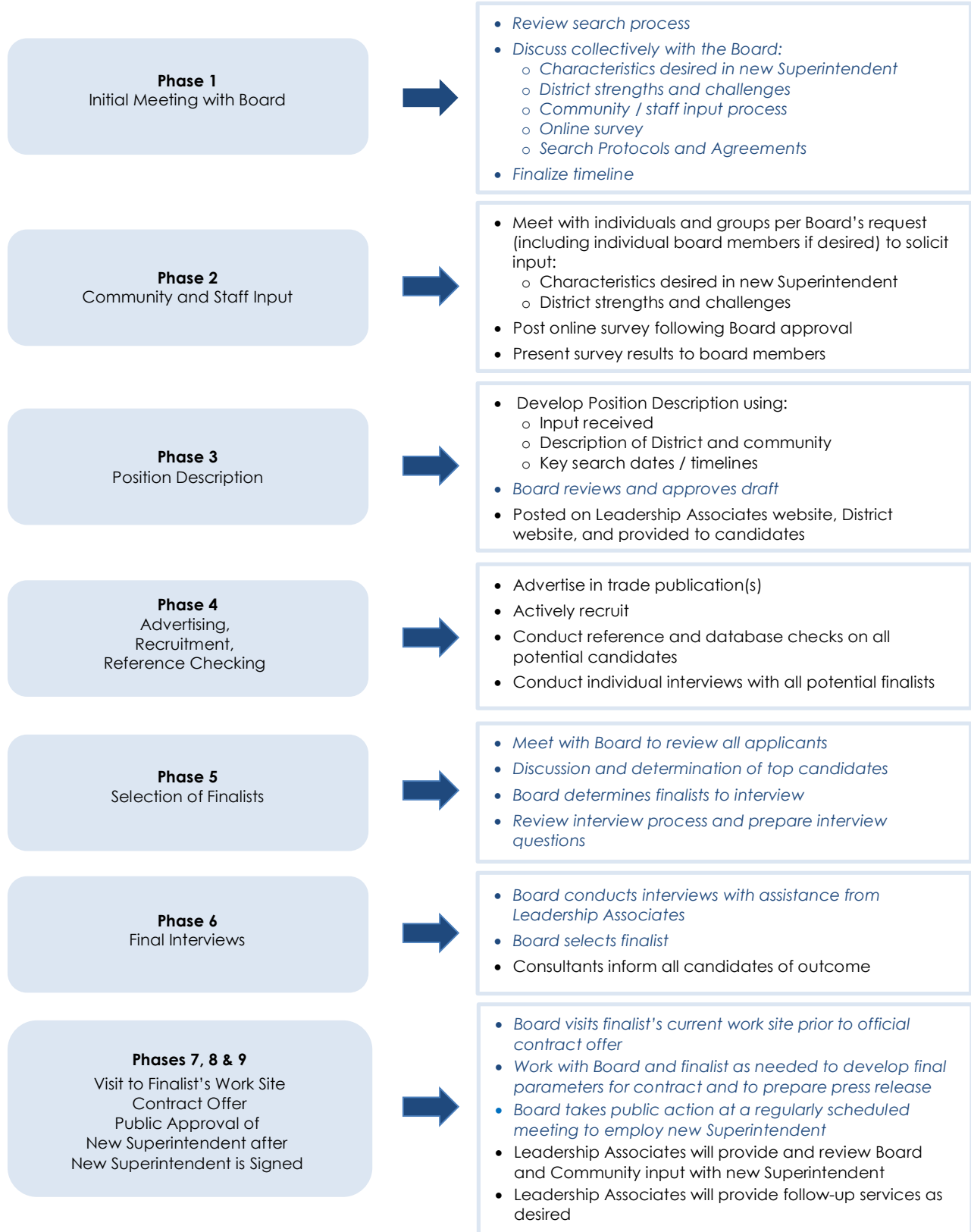
We provide and review with the new superintendent the Board and community input. We are available to provide additional follow up services as desired. These services could include developing a transition plan and an initial workshop for the governance team to establish goals for the new superintendent,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





PROPOSED TIMELINE

(Flexible based on Board direction)

Alameda Unified School District Superintendent Search 2019

Note: *Blue italicized text* indicates Board Participation

MARCH 2019	March 7, 12 noon	District receives proposals
	March 12	<i>Proposal Presentations / Board Selects Firm</i>
MAR-APR 2019 Phases 1-4	March 27	<i>Board meets with consultants and determines characteristics, skills & qualities desired in a new superintendent; Board publicly announces timeline and procedures for superintendent selection</i>
	March 28	Consultants meet with staff and community designated by Board to receive input; Online survey is posted to district website
	March and April	Consultants identify potential candidates; Development and posting of recruitment materials and Position Description
	April 1 & 15	Advertising and active recruitment; Ad appears in <u>EdCal</u> , (Two consecutive publications)
APR-MAY 2019 Phase 5	April 22 5:00 PM	Deadline for applications
	April	Consultants complete comprehensive reference and background checks on applicants
	May 1	<i>Board meets with consultants, reviews all applications and selects finalists to be interviewed</i>
MAY 2019 Phases 6-8	May 17 & 18	<i>Board interviews finalists</i>
	TBD	<i>Board completes validation visit of leading candidate's community and makes final determination on selected candidate.</i>
	May 28	<i>Board approves superintendent contract at a regularly scheduled board meeting</i>
AUG 2019 Phase 9	August 1 (or mutually agreed date)	New superintendent begins



COST PROPOSAL

ALAMEDA UNIFIED SCHOOL DISTRICT SUPERINTENDENT SEARCH 2019

***TOTAL FEE TO CONDUCT SEARCH – All Inclusive: \$25,500**

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
 - scheduling 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

GUARANTEE

Should the new superintendent leave within one year, Leadership Associates will conduct a new search at no cost except for travel and advertising expenses, provided the Board majority remains the same.



SAMPLE CONTRACT

LEADERSHIP ASSOCIATES
www.leadershipassociates.org
3905 State Street #7-407
Santa Barbara, CA 93105
(805) 364-2775

AGREEMENT FOR CONSULTANT SERVICES

THIS AGREEMENT is made this ____ **day of March, 2019** between LEADERSHIP ASSOCIATES, hereinafter called the Contractor, and **ALAMEDA 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-FIVE THOUSAND, FIVE HUNDRED DOLLARS (\$25,500)** for services provided. Payment is to take place in two increments: **(1) \$12,750** upon completion of stakeholder input, and **(2), \$12,750** 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
50-855 Washington Street #C-205
La Quinta, CA 92253**

The Contractor is to perform the above services beginning [Month]____, 2019.

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#: 68-0383653

DISTRICT:
ALAMEDA UNIFIED SCHOOL DISTRICT

By: _____

By: _____

Name: Eric Andrew, Ed.D.

Name: _____

Title: Lead Consultant

Title: _____

Date: _____

Date: _____

ACSA Career Center Ad (Online)

Superintendent, Evergreen School District Leadership Associates



Application



CONTINUE TO APPLICATION

By using this feature you agree to our [Terms and Conditions](#) and [Privacy Policy](#).

Details

Posted:

February 21, 2019

Location:

San Jose, California

[Show Map](#)

Salary:

Competitive Salary

Type:

Contract - Experienced

Category:

Superintendent

Evergreen School District is seeking to hire a superintendent. [Leadership Associates](#) has been contracted by the Evergreen School District to assist with the recruitment for this position.

To learn more about the position and District, please continue reading.

To apply for this position, send an email with your name, current title, employer, and phone number to:

Becky Banning
Executive Assistant, Leadership Associates
bbanning@leadershipassociates.org

Application Deadline: 5:00 PM, March 22, 2019

Lead Consultants: Eric Andrew, Ed.D., Fred Van Leuven, Ed.D.

For more details about this position, please visit the [Leadership Associates](#) website.

ACSA Career Center Ad (Online)

Please do not submit correspondence or application materials for this position via the ACSA Career Center webpage.

ABOUT THE DISTRICT

Mission Statement

Evergreen Elementary School District provides all students a high-quality education in a safe and nurturing environment where each student demonstrates a spirit of respect, responsibility, global-mindedness and a commitment to academic and civic excellence.

Vision Statement

Evergreen Elementary School District, in partnership with the community, will be a place where teachers, staff and students are partners in developing each student's unique potential.

- [Mission/Vision Statement \(English\) \(PDF\)](#)
- [Mission/Vision Statement \(Spanish\) \(PDF\)](#)
- [Mission/Vision Statement \(Vietnamese\) \(PDF\)](#)

Our Brand Promise

We are responsive, future thinking, and reflective of the innovative community in which we live. We aspire to provide an unparalleled education for our students, one that will prepare them for the world that awaits them. We embody the warmth of a family, one that looks out for one another at all times.

We are a community of education professionals that respects the talents, skills and imagination of our teachers, staff and administrators. Our people are our greatest resource and the relationships with and among that resource must be nourished in every interaction, every communication.

We are part of a thriving, vibrant community. That community gives life to the school district. We are only as strong as the families, neighbors and partners that make up the Evergreen community and we work to strengthen those community bonds in everything we do.

We have a rich, proud history. One we strive to build on every day and one we honor as we embrace the future.

[Learn more about Evergreen School District](#)



SAMPLE ONLINE SURVEY

INTRODUCTION

The [District Name] School District Governing Board is asking for your help in selecting the next superintendent of schools. We have requested that the consultants from Leadership Associates, who are assisting the Board with the search, conduct an online survey to solicit input from students, staff, parents, and community.

The following survey asks you to respond to several critical questions. The information generated from this survey will be used to develop a profile which indicates desired qualities and characteristics in the next superintendent. It will also guide the recruitment and reference checking process as well as development of questions for the interview. The survey also seeks your perspectives on District strengths, challenges, and our community. Consultants will compile a report summarizing survey results and share it with the Board.



SAMPLE ONLINE SURVEY

BACKGROUND INFORMATION

PLEASE TAKE A MOMENT TO PROVIDE THE FOLLOWING INFORMATION:

1. My perspectives come from being a (check all that apply):

- Parent/Guardian
- Student
- Community Member
- Teacher
- Classified Employee
- Administrator
- Other Certificated
- School Volunteer
- Public Official
- Business Owner / Partner
- Non-Profit Staff / Board



SAMPLE ONLINE SURVEY

DISTRICT STRENGTHS & CHALLENGES; COMMUNITY

2. What do you see as the strengths of the District?








3. What do you see as the major challenges which will confront our new superintendent?

4. What is important for our next superintendent to know about our community?

5. Please add any other qualities and characteristics which you think are important for our next superintendent to possess.

**SAMPLE ONLINE SURVEY****DESIRED PROFESSIONAL EXPERIENCE**

6. Please rank, in order of importance between 1 and 7, (1 being the most important), the following professional experiences that you believe are most important for the next superintendent to possess, as they relate to the needs of the District.

	<input type="text" value=""/>	Experience in California public education, either teaching and/or site administration
	<input type="text" value=""/>	Experience as an assistant superintendent or associate superintendent
	<input type="text" value=""/>	Experience as a superintendent in a comparable district
	<input type="text" value=""/>	Experience in oversight of school district finances, budgets, and business management
	<input type="text" value=""/>	Experience in management of school facilities
	<input type="text" value=""/>	A proven track record of growing academic achievement for all students, including special needs children, second language learners, and children of poverty
	<input type="text" value=""/>	Bilingual








**SAMPLE ONLINE SURVEY****DESIRED PROFESSIONAL LEADERSHIP CHARACTERISTICS**

7. Please rank, in order of importance between 1 and 7, (1 the being most important), the following professional leadership characteristics that you believe are most important for the next superintendent to possess, as they relate to the needs of the District.

<input type="checkbox"/>	<input type="text"/>	Is a strong instructional leader who will maintain and improve the student achievement gains made in the District
<input type="checkbox"/>	<input type="text"/>	Will bring the entire community together toward a strong vision of student achievement
<input type="checkbox"/>	<input type="text"/>	Will place the highest priority on safe environments for students and staff
<input type="checkbox"/>	<input type="text"/>	Has strong human relations skills and is a "people person"
<input type="checkbox"/>	<input type="text"/>	Will be accessible to parents and staff
<input type="checkbox"/>	<input type="text"/>	Will be highly visible at our schools and community events
<input type="checkbox"/>	<input type="text"/>	Has the ability to coach and develop potential leaders within the District, and create a strong, cohesive working team

**SAMPLE ONLINE SURVEY****DESIRED PERSONAL CHARACTERISTICS**

8. Please rank, in order of importance between 1 and 7, (1 being the most important), the following personal characteristics that you believe are most important for the next superintendent to possess, as they relate to the needs of the District.

	<input type="text" value=""/>	Decisive
	<input type="text" value=""/>	Organized
	<input type="text" value=""/>	Approachable
	<input type="text" value=""/>	Democratic
	<input type="text" value=""/>	Receptive to ideas
	<input type="text" value=""/>	Imaginative
	<input type="text" value=""/>	Pragmatic



3905 STATE STREET, #7-407
SANTA BARBARA, CALIFORNIA 93105
(805) 364-2775
WWW.LEADERSHIPASSOCIATES.ORG

ERIC ANDREW ♦ KENT BECHLER ♦ JAMES BROWN ♦ MARC ECKER ♦ RICHARD FISCHER ♦ SALLY FRAZIER ♦ JUAN GARZA ♦ PEGGY LYNCH ♦ MIKE MILLER ♦ PHIL QUON ♦ DENNIS SMITH ♦ RICH THOME ♦ SANDY THORSTENSON ♦ DAVID VERDUGO

February 17, 2018

Dear Trustees:

The past two weeks have helped to shed more light on several important aspects of the superintendent search process. We wanted to share with you what we have learned and indicate the next steps we plan to take.

SUMMARY OF INPUT FROM MEETINGS AND OTHER SOURCES

Let's start by reviewing input from key stakeholders which we have received through conversations with you, the engagement meetings this week, phone conversations, and preliminary results of the on-line survey. We plan to send our detailed notes from the meetings to you by no later than next Monday followed by the on-line survey results.

There is a good degree of consistency between the qualities and characteristics that you brought to our attention and what we have subsequently heard. That said, we heard an interest in making sure we have considered all qualified candidates whether they have background in the area or not. As an example, there was interest expressed in hiring a qualified education leader with a successful track record in dealing with the issues facing the district. Ideally, that person would have direct knowledge of these issues, familiarity with its cultural diversity and commitment to equity, plus have a commitment to being part of the District and community over the long term. Stability of leadership was seen as absolutely essential. This is somewhat an expanded definition of "local" over what we first discussed.

There was also interest expressed in having someone who is skilled at the implementation part of leadership and management. Strengthening the district's administrative operations, which tend to be viewed as inefficient and ineffective, will be an important task for the new superintendent. There was also interest expressed in having someone who will work to strengthen the work of the governance team helping the Board come together on resolution of the challenges facing the district.

Here's a list gathered from the meetings, which summarizes these and other points related to qualities and characteristics.

The new superintendent will:

1. Be a strong education leader who will work collaboratively with others
2. Be a good listener and exhibit humility in dealings with others
3. Value cultural diversity and be sensitive to the different perspectives of the district's multicultural community
4. Be familiar with the issues facing the district and have a track record in dealing with those effectively
5. Have a track record of success in improving the lives of children
6. Make a long-term commitment to leading the district forward
7. Engage diverse stakeholders in meaningful ways in district decision-making processes
8. Make the district's public schools the first choice of every family
9. Implement the changes in staff required to ensure the staff reflects the diversity of the community
10. Build consensus among the Board, staff, and community on effective strategies for improving achievement for all student groups
11. Unify the Board and strengthen the work of the governance team
12. Possess strong operational skills so that district administrative systems and structures function more efficiently and effectively
13. Be able to identify top priorities and focus district initiatives on those priorities
14. Respect and strengthen further the good programs the district has
15. Have a record of effective financial management and possess the knowledge and skills necessary to help the district remain fiscally solvent
16. Keep the interests of all students and their families as top priority
17. Be able to mobilize resources to support the District's work
18. Hire and retain a high-quality teaching staff and leadership team

POSITION DESCRIPTION

A revised position description has been sent to your Board committee for review and modification. We very much appreciate their help with this. We are on schedule to have a draft to the full Board so that it can be acted upon at your next meeting.

ON LINE SURVEY

The on-line survey deadline has been extended to close on February 20, at 9:00 PM. We will have results to you by mid-week. As of the time of this correspondence, we have received a total of 940 responses to the English survey and 14 responses to the Spanish survey. This is a very good overall response rate.

ADVERTISING

In addition to posting the position on our website, we will be running an ad in Ed Cal, which is ACSA's statewide publication. We want to be sure that there is awareness of the position and that we don't miss someone who may be well qualified. We do not plan to advertise in a national publication preferring to stay focused on California and people with experiences that will be directly related to what the district is seeking.

CONTRACT PARAMETERS

After your meeting next week, it would be good if we could have a conference call to discuss the Board's contract parameters.

In closing, we appreciate the time you are taking to make all of this work for your students, staff, and community.

Best wishes,

Consultant Team
Leadership Associates

SAMPLE



ERIC ANDREW ♦ KENT BECHLER ♦ JAMES BROWN ♦ MARC ECKER ♦ RICHARD FISCHER ♦ SALLY FRAZIER ♦ JUAN GARZA ♦ PEGGY LYNCH ♦ MIKE MILLER ♦ PHIL QUON ♦ DENNIS SMITH ♦ RICH THOME ♦ SANDY THORSTENSON ♦ DAVID VERDUGO

July 11, 2018

Dear School District Board of Trustees,

During the recruitment period, forty-six (46) contacts or inquiries were made with individuals either being encouraged to consider application or who made inquiry about his/her skill set for the Superintendent position. Of the 46 individuals, twenty-six (26) submitted application materials for your superintendent position. Of those making application, twenty-one (21) applicants submitted packets between July 6 and July 10. To keep you updated on the candidate pool, the following is a profile of the candidates who submitted the application materials.

Initial review of the applications indicates we should have many strong candidates to recommend your Board consider inviting for interview.

The twenty-six applicants have the following status:

Applicants (26)

- 13 current, interim or former Superintendents
- 5 Deputy Superintendents
- 1 Assistant Superintendent
- 1 Administrator
- 2 Executive Directors
- 1 Vice Provost
- 1 State Reform Officer
- 1 Principal
- 1 Instructor

We will now embark on reference checking of the candidates in preparation for our August 3rd meeting with your Board. At that closed session meeting, we will make recommendation of candidates to consider inviting for interview, finalize the interview questions, location and schedule.

Best regards,
Consultant Team

Press Release Sample



Dr. Maria Martinez-Poulin chosen as Finalist for Superintendent Position

Photo
goes
here

Following an extensive search, which brought 23 highly qualified candidates from several states in the nation, the Whittier City School District has selected Dr. Maria Martinez-Poulin, current Assistant Superintendent of the Centralia School District as the finalist.

School Board President, Cecilia Perez said, “Dr. Martinez-Poulin was chosen as our finalist from numerous highly qualified candidates across the nation, brought to us by Leadership Associates, including seated Superintendents, Associate and Assistant Superintendents, and other highly qualified educational leaders.

Dr. Martinez-Poulin’s experience in leadership at both the elementary and high school levels as well as her knowledge of strategies to bring the Board, District community and stakeholders together around a strong, united focus on student achievement make her an excellent choice for our community and school district. Her 13 years of experience in the classroom will bring new insights to Whittier City. Her deep and detailed knowledge and passion for what our students need, along with her outstanding leadership and teaching practices are a great match for our community.

We are proud of the work that our teachers, our classified employees, all support personnel and community members have accomplished as our District implemented the Local Control Accountability Plan and moved toward next generation standards. Dr. Martinez-Poulin is a courageous leader who is willing to speak on behalf of all children and the District Community. She has a track record of working with school board members to keep everyone focused on student matters.

In her prior work Dr. Martinez-Poulin obtained invaluable experience seeking new ways to attract unrepresented parents to become active in their child's education. She is committed to promoting equity in a diverse community such as Whittier. Dr. Martinez-Poulin is reflective of our community’s values, culture and of our student population and she understands all educational programs and related budgets.”

Dr. Martinez-Poulin has served as the Assistant Superintendent, Curriculum and Instruction in the Centralia School District for the last four years. She was as an Instructional Aide at the elementary level for four years, an Elementary School Teacher for five years, a Secondary School Teacher and Department Chair at the high school level for eight years, a High School Assistant Principal for two years, and an Elementary School Principal for five years prior to her current assignment.

Dr. Martinez-Poulin received her Bachelor of Arts degree in English at California State University, Los Angeles, her Master of Arts degree in Secondary Education at Loyola-Marymount University, Los Angeles, and her Doctorate in Education at the University of Southern California.

Dr. Martinez-Poulin is fluent in Spanish and English. Board approval of Dr. Martinez-Poulin is scheduled to take place at the regular board meeting on July 17, 2018.



REFERENCES

ALAMEDA UNIFIED SCHOOL DISTRICT Superintendent Search 2019

1. District: [MODESTO CITY SCHOOLS](#)
Contract Service: Superintendent Search
Contact: Amy Neumann
Title: Board President
Phone: (209) 605-0219
Email: Neumann.a@mcs4kids.com
2. District: [EMERY UNIFIED SCHOOL DISTRICT](#)
Contract Service: Superintendent Search
Contact: Donn Merriam
Title: Board Member
Phone: 415.902.1983
Email: donn.merriam@emeryusd.org
3. District: [VALLEJO CITY UNIFIED SCHOOL DISTRICT](#)
Contract Service: Superintendent Search
Contact: Ruscal Cayangyang
Title: Board President
Phone: (707) 556-8921 ext 50002
Email: rascalcayangyang@icloud.com



QUALIFICATION STATEMENT

EXPERIENCE AND QUALIFICATIONS OF THE FIRM

Leadership Associates has conducted over 385 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 Dialogue; Association of California School Administrators (ACSA); California Association of Latino Superintendents and Administrators (CALSA); California Association of African-American School Administrators (CAAASA); 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 the California state superintendent's committee for ACSA; two were presidents of ACSA
- 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*

QUALIFICATIONS OF LEAD CONSULTANTS

Eric D. Andrew, Ed.D. – Partner (Full Bio Attached)

Eric served as Superintendent of Campbell Union School District from February 2010 until his retirement in 2017. Throughout his education career from 1979 through 2017, he has served in the districts of Claremont, Redlands and Glendora Unified as a teacher, Director of Student Services and Assistant Superintendent of Educational Services. Eric teaches in the National Association of School Superintendents' Leadership Educational Administration Program for the Santa Clara County Office of Education. He has earned several distinctions, including being named a finalist for the National Association of School Superintendents (NASS) Superintendent of the Year and ACSA Region 8 Superintendent of the Year. He holds a masters degree in education from Cal-Poly Pomona and a doctorate in education from the University of LaVerne.

Juan Garza – Partner (Full Bio Attached)

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.

QUALIFICATIONS OF SUPPORTING CONSULTANTS

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.

Richard Fischer – Partner

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.

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.

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 30 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 (25,000 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 20 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 served as Superintendent of Schools for South Bay Union School District, Cardiff Elementary School District and Assistant Superintendent, Human Resources and Technology for the San Diego county Office of Education. He has conducted more than 81 executive searches and more than 120 Board workshops or Superintendent Evaluations with School Boards. He recently served as Director of Partnerships and Professional Learning for the Institute for Entrepreneurship in Education (IEE), a professional development and research center in the School of Leadership and Education Sciences (SOLES), at the University of San Diego. 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 California State University, Los Angeles, and his Master's Degree from Pepperdine University. He is fluently bilingual in Spanish and received his Bilingual, Cross Cultural Specialist credential in California. Rich has been honored with the Honorary Service Award from the California Congress of Parents, Teachers and Students; The Orange County Hispanic Educator of the Year Award; and the Apple Distinguished Educator Award. Rich gained State-wide distinction while serving as Chairperson of the Superintendents' Technology Advisory Committee and leading the expansion of technology centers and efforts of school districts throughout the region as the Assistant Superintendent of Technology and Human Resources for the County of San Diego. One of these distinctions was directing the California Project, to assist parents of English language learners.

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, serves on the board of directors of the Soroptimist International of Whittier and is an associate partner with Leadership Associates.

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 of Schools for the Paramount Unified School District (17,000 ADA) in Los Angeles County for 9 years. He also served as the Assistant Superintendent of the Placentia-Yorba Unified School District (25,000 ADA) and has held positions of Assistant Superintendent, Director of Secondary Education, Principal at both Elementary and High School levels as well as teacher and coach. David has served a total of 43 years in the field of education spanning Grades K-12. During his 43 years in the field of education, 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 ACSA's 2008 Region 14 Superintendent of the Year, and received the California State University Long Beach Outstanding Superintendent Leadership Award in 2012 and the Association of Latino Administrators and Superintendents (ALAS) National Outstanding Educator Award in 2013. 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. Currently he is the Executive Director of the California Association of Latino Superintendents and Administrators (CALSA) as well as the former Superintendents' Leadership Academy Director for the Association of Latino Administrators and Superintendents (ALAS) based in Washington, D.C.



Eric Andrew, Ed.D., Partner

Biographical Information

- Dr. Eric D. Andrew served as Superintendent of Campbell Union School District from February 2010 until his retirement in June 2017. As chief executive of the preschool-through-eighth-grade public school district, he was responsible for leading all aspects of the District's instructional and operational programs.
- 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 was a school principal for elementary, middle and high schools. He served as director of student services in Redlands Unified School District, and before Campbell Union SD, he was assistant superintendent of educational services in Glendora Unified School District.
- Dr. Andrew teaches in the National Association of School Superintendents Leadership Educational Administration Program for the Santa Clara County Office of Education.
- As an 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 masters in education from Cal-Poly, Pomona, an administrative credential from Cal State, San Bernardino and a doctorate in education from the University of La Verne.
- He and his wife, Lisa, live in Campbell, California. They have four grown children and three grandchildren.



Juan G. Garza, Partner

Biographical Information

- Prior to joining Leadership Associates, Mr. Garza served as Superintendent of Kings Canyon Unified School District for 15 years. Kings Canyon Unified School District is a K-12 district with 22 schools and an enrollment of 10,000 students. He also served as Assistant Superintendent for Human Relations.
- Mr. Garza served students, parents, staff and community as Principal of a High School, Associate Principal, Principal of Alternative Education, High School Counselor, High School Teacher and Coached at various sports.
- Mr. Garza received a BA from Fresno State, Pupil Personnel Credential from San Jose State University and masters degree from Fresno Pacific University.
- Mr. Garza received an award from the James Irvine Foundation for his Leadership and was awarded the Migrant Region IV Distinguished Migrant Alumni Award. Additionally, He was inducted into the Reedley Chamber of Commerce Hall of Fame.
- Mr. Garza also serves on the Presidents' Commission for Teacher Education at Fresno State, is a member of the California Association of Latino Superintendents and Administrators (CALSA) and is Director of the Association of California School Administrators (ACSA) Superintendents' Academy in Fresno.
- Mr. Garza has co-presented with Mike Smith of Lozano Smith Law Firm on Board/Superintendent Relations.
- Mr. Garza was born in Texas to Migrant parents and followed the crops in Texas and California. His parents' base was a labor camp by Woodlake, California. He has been married to Elena for 42 years. He has a son, daughter and 2 grandchildren.



EXECUTIVE SEARCHES 2013-Current

STATEWIDE

Association of California School Administrators (ACSA)	Executive Director
California Collaborative for Educational Excellence (CCEE)	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
Mt. Diablo USD	Contra Costa	31,923
San Ramon Valley USD	Contra Costa	31,900
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
Antioch USD	Contra Costa	18,352
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
Walnut Valley USD	Los Angeles	14,658
Vallejo City USD	Solano	14,554

<u>District</u>	<u>County</u>	
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
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
Victor ESD	San Bernardino	11,531
San Lorenzo USD	Alameda	11,530
Franklin---McKinley SD	Santa Clara	11,269
Lucia Mar USD	San Luis Obispo	10,710
Pittsburg USD	Contra Costa	10,560
Azusa USD	Los Angeles	10,518
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
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
Santa Maria JUHSD	Santa Barbara	7,633
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
Sonoma Valley USD	Sonoma	4,564
San Lorenzo Valley USD	Santa Cruz	4,444
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
Eureka City Schools	Humboldt	3,884
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

<u>District</u>	<u>County</u>	<u>ADA</u>
Cabrillo USD	San Mateo	3,357
Cambrian SD	Santa Clara	3,349
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
Byron Union SD	Contra Costa	1,686
Reed Union SD	Marin	1,556
Larkspur-Corte Madera SD	Marin	1,523
Las Lomas ESD	San Mateo	1,336
Wilsona SD	Los Angeles	1,315
St. Helena USD	Napa	1,295
Guadalupe Union SD	Santa Barbara	1,280
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
Eastern Sierra USD	Mono	417
Le Grand Union ESD	Merced	401
Kings River Union ESD	Tulare	476
Alview-Dairyland Union SD	Madera	367
<u>EXECUTIVE DIRECTOR/DIRECTOR</u>		
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	
University of California Los Angeles (UCLA)	Los Angeles	
West End SELPA	San Bernardino	
West San Gabriel Valley SELPA	Los Angeles	



COMMENDATIONS

The following are excerpts from letters of recommendation written by boards that selected Leadership Associates as their search consultant.

Fresno Unified School District: 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.

Larkspur-Corte Madera School District: Searching for and choosing a superintendent is one of, if not the, most important pieces of work a school board can undertake and Leadership Associates was the absolute right fit for our search needs. Our consultants' collective years of experience as successful superintendents themselves elevated our thoughtful and thorough search process. They helped us identify our needs and reached out to their extensive network, bringing forward to our board a rich field of candidates for consideration. The consultants were responsive, patient, and adaptive to our process. We worked well as a team and that made all the difference.

Wiseburn USD: 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 Joint Union Elementary School District: 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 School District: 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 Unified School District & Plumas County Office of Education: 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 School District: The Board of the East Whittier City School District wishes to thank your organization for appointing Sandy Sanchez Thorstenson and Marc Ecker to supervise and coordinate our superintendent search this spring. I am confident that I don't need to tell you that Sandy and Marc are two exceptional individuals to work with, but I will anyway. 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, which we enjoyed. It was challenging to decide which of the candidates 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 Unified School District: 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.

Franklin-McKinley SD: Once selected as the superintendent search firm by the board, we were immediately contacted to begin the process following the step-by-step process submitted with the proposal. I was especially pleased that all of the steps were followed and that there were no surprises throughout the search that could have potentially caused uneasiness by the board.

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 Unified School District: 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 School District: 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.

Palo Alto USD: Not only does Leadership Associates bring an incredible wealth of experience and competence to the task, they also are so personally engaging and professional that it makes the process most pleasant.

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.

Santa Ynez Valley UHSD: We are extremely pleased with our choice, but feel that the other candidates we interviewed would have been excellent as well. You actually made our lives more difficult by providing such great candidates from which to choose.

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 School District: 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 School District: 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.

NONDISCRIMINATION CERTIFICATION

I am aware of and hereby certify that Contractor shall comply with Section 1735 of the Labor Code, which provides as follows:

No discrimination shall be made in the employment of persons upon public works because of the race, religious creed, color, national origin, ancestry, physical disability, mental disability, handicap, medical condition, marital status, or gender of such persons, except as provided in Section 12940 of the Government Code, and every contractor for public works violating this Section is subject to all the penalties imposed for a violation of [Chapter 1 of Part 7, Division 2 of the Labor Code].

By 
Signature

Eric Andrew, Ed.D.
Typed or Printed Name

Lead Consultant
Title

March 6, 2019
Date

WORKERS' COMPENSATION CERTIFICATION

Labor Code section 3700 in relevant part provides:

Every employer except the State shall secure the payment of compensation in one or more of the following ways:

- (a) By being insured against liability to pay compensation in one or more insurers duly authorized to write compensation insurance in this State.
- (b) By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his employees.

I am aware of the provisions of section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.



Signature

Eric Andrew, Ed.D., Lead Consultant

Title

Leadership Associates

Company

(In accordance with article 5 (commencing at section 1860), chapter 1, part 7, division 2 of the Labor Code, the above certificate must be signed and filed with the awarding body prior to performing any work under this contract.)

NONCOLLUSION DECLARATION
TO BE EXECUTED BY BIDDER AND SUBMITTED WITH BID

Project: SUPERINTENDENT SEARCH

I, Becky Banning, declare that I am the Executive Assistant of Leadership Associates, the party making the foregoing bid, that the bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone shall refrain from bidding; that the bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Company Name Leadership Associates

Company Address 3905 State Street #7-407, Santa Barbara, CA 93105

Signature of Officer Becky Banning

Title Executive Assistant

**See Attached
Notarial Document**

NOTARY FOR NONCOLLUSION DECLARATION

Subscribed and sworn to (or affirmed) before me this _____ day of _____, 20 .

Signature of Notary

[SEAL OF NOTARY]

Typed Name of Notary

(See attached Notarized Form)

CALIFORNIA JURAT WITH AFFIANT STATEMENT

GOVERNMENT CODE § 8202

- See Attached Document (Notary to cross out lines 1-6 below)
- See Statement Below (Lines 1-6 to be completed only by document signer[s], *not* Notary)

1 _____
 2 _____
 3 _____
 4 _____
 5 _____
 6 _____

Signature of Document Signer No. 1 _____ Signature of Document Signer No. 2 (if any) _____

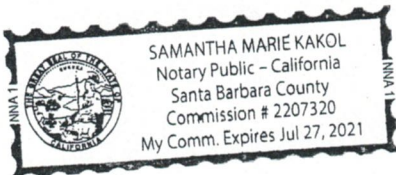
A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California
 County of Santa Barbara

Subscribed and sworn to (or affirmed) before me
 on this 6 day of March, 2019,
 by _____
 Date Month Year

(1) Becky Banning

 (and (2) _____),
 Name(s) of Signer(s)



proved to me on the basis of satisfactory evidence
 to be the person(s) who appeared before me.

Signature _____
 Signature of Notary Public

Seal
 Place Notary Seal Above

OPTIONAL

Though this section is optional, completing this information can deter alteration of the document or fraudulent reattachment of this form to an unintended document.

Description of Attached Document

Title or Type of Document: _____ Document Date: _____

Number of Pages: _____ Signer(s) Other Than Named Above: _____