

SIERRA SANDS UNIFIED SCHOOL DISTRICT

**Board of Education
Special Meeting**

**NOVEMBER 18, 2013
District Office Conference Room A
113 Felspar
www.ssusdschools.org**

We, the members of the Board of Education of the Sierra Sands Unified School District, are committed to providing the highest quality education in a safe environment to all K-12 students. We believe the school shares with the family, church, and community the responsibility for developing life-long learners who are responsible, productive

A G E N D A

CALL TO ORDER AND PLEDGE TO THE FLAG

6:15 P.M.

Amy Castillo-Covert
Judy Dietrichson
Bill Farris, President
Tom Pearl
Kurt Rockwell, Vice President/Clerk
Michael Scott

Joanna Rummer, Superintendent

1. ADOPTION OF AGENDA
2. GENERAL ADMINISTRATION
 - 2.1 Presentation and Possible Selection of Search Firm for Services in the Process of Selection of Superintendent
 - 2.2 Discussion and Possible Authorization for Board Member Travel to the 2013 CTA Fall Leadership Conference in Las Vegas, Nevada on November 22-24, 2013
3. ADJOURNMENT

2. GENERAL ADMINISTRATION

2.1 Presentation and Possible Selection of Search Firm for Services in the Process of Selection of Superintendent

BACKGROUND INFORMATION: The Superintendent of Sierra Sands Unified School District has submitted her resignation effective June 30, 2014. The Board of Trustees of Sierra Sands Unified School District wishes to engage the services of a search firm to assist the Board in the process of selecting a new superintendent. Joanna Rummer, Superintendent, contacted the California School Boards Association, the Association of California School Administrators, and the Kern County Superintendent of Schools for recommendations of search firms that might be able to assist the Board in a search process. A list of seven firms was provided to the District. Two firms were located out of state, and three were located in the northern portion of the State. The final two firms were recommended to the District as firms that would likely provide the services to best meeting the needs of our Board.

CURRENT CONSIDERATIONS: The Board would like to consider the presentations and personal interviews of two search firms to determine if, after the presentations and personal interviews, a selection can be made regarding the firm that would best serve the needs of the Board.

FINANCIAL IMPLICATIONS: The cost of the search process is dependent upon negotiations with the selected search firm; however, the District believes that the cost of the search will not exceed \$25,000.

SUPERINTENDENT'S RECOMMENDATION: The recommendation of the Superintendent is that the Board of Trustees of Sierra Sands Unified School District review the presentations and conduct personal interviews of the two search firms and determine if they would like to select one of the firms that would best meet the needs of the Board in the search for a new Superintendent of Sierra Sands Unified School District.

October 26, 2013

Dear Superintendent Rummer and members of the Governing Board:

You will receive in a separate e-mail a formal proposal from DLA (Dave Long Associates Executive Search Services) to assist you in selecting your next superintendent. We would be honored to assist you in this process.

Previously, we had sent you a message suggesting a two phase approach to your search. However, after a very recent experience with a search that we believe has similar circumstances to your district, we have decided that a two phase search might not be in your best interests. Therefore, you will see that our proposal suggests a search that has one phase only and one that is advertised outside of the district in EdCal. Why do we think that this process is in your best interest? We believe that a district that may have some inside applicants is best served when the search process allows these applicants to be evaluated along with outside applicants. The only way that this is possible is by having ALL applicants go through the same application and screening process.

Our search process includes having professional screeners (part of our DLA team) review all completed applications, compare the qualifications and experiences of all applicants against the leadership profile that you, the Board, have identified as critical for the new superintendent to possess, and then making recommendations to you as to which candidates match your profile. Of course, it is ultimately up to you who will be interviewed. As a result of this thorough process, our advisors will be able to report on the strengths and needs

of all candidates in order to allow the Board to determine the strengths of both inside and outside candidates.

For the reasons stated above, we believe that a two phase search approach is not as desirable as the approach we suggest in our proposal.

I would also like to give you the names and contact numbers of some of our very recent searches. All of the names listed were the names of the Governing Board President or Clerk at the time of the search.

- 1. Kelli Moors, Carlsbad Unified School District-**
- 2. Keith Wolaridge, Panama-Buena Vista School District-**

- 3. Bob Smith, Needles Unified School District-**

In closing, our proposal lists Dr. Jay Hoffman as your search advisor. You will note from reading his biography that Jay is a very unique individual. He has had numerous successful teaching and administrative experiences and most recently was elected as a board member to the Riverside County Office of Education. Above all, however, are his interpersonal skills and he belief in ALL children. These are part of the reasons that we have specifically selected him to assist with the Sierra Sands Unified School District search.

Thank you for the opportunity to share this additional information with you. Please contact me if I can answer any questions or provide additional information.

Patricia B. Novotney, Ed.D.

951-600-8747 (office)

SIERRA SANDS UNIFIED SCHOOL DISTRICT

**PROPOSAL FOR
SUPERINTENDENT SEARCH**



Dave Long & Associates

**636 Loretta Drive
Laguna Beach, CA 92651
(916) 616-6027
(760) 567-5590**

www.DLAssoc.com

October, 2013



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Executive Search Services

October 26, 2013

William Farris, Board President
SIERRA SANDS UNIFIED SCHOOL DISTRICT
113 Felspar Avenue
Ridgecrest, CA 93555

Dear Mr. Farris and Other Members of the Board:

Thank you for expressing an interest in Dave Long & Associates possibly assisting the SIERRA SANDS UNIFIED SCHOOL DISTRICT Board of Trustees in conducting a search for its next superintendent. We are extremely interested in working with the Board members in this important endeavor.

Before describing our services, I would first like to introduce myself and our firm. My professional career has spanned over 40 years and includes a background of experiences in classroom teaching and administration. I have served as assistant principal, school principal, assistant superintendent, district superintendent, county superintendent of schools and most recently Secretary of Education for the State of California. These experiences have made it clear to me that the superintendent of schools and school board establish a foundation for effective governance. Ultimately this provides vital leadership for the school system to serve children and the community. Thus, hiring a superintendent is one of the most important decisions your Board will ever make. I have a strong desire to assist you in this important function.

As you may know, the California School Boards Association has curtailed its involvement in superintendent searches. My firm has been fortunate to acquire the services of their top consultants, all who have enjoyed distinguished careers in education. They bring a rich background of success in having served as lead search advisers for many school districts throughout the state. For several years prior to that, they each assisted in executive searches by acting as professional screeners. Recently we added the services of other retired superintendents who have enjoyed long, successful careers in California public school districts.

I am also a search consultant having performed those duties as a county superintendent of schools and after as a Dave Long & Associates Executive Search team member. I believe our unique backgrounds, experiences, and relationships developed over decades working as superintendents and search advisers bring a high level of expertise to the executive search process. Our team of consultants and associates appreciate the uniqueness of each district and will design our search processes to be flexible in order to meet your needs.

Mr. Farris and Other Members of the Board
October 26, 2013
Page two

We are particularly proud of our ability to recruit a diverse candidate pool that not only meets the leadership profile set by the board, but is reflective of the composition of the communities served by the district. Through their extensive professional activities, our consultants and associates maintain contacts with individuals who are representative of our state's diverse population. This sophisticated network of contacts is enhanced by a strong recruitment campaign. We are committed to recruiting a field of candidates that is reflective of the qualities, traits, experiences, background and training sought by the board in its next superintendent. Our guarantee is that if the board is not satisfied with its pool of candidates following interviews, we will continue the search for expenses only.

Our all inclusive fee to conduct the search recommended in this proposal will be \$14,400. This includes all consultant expenses; distribution through the Internet of a basic brochure; advertising on websites and in publications of the Association of California School Administrators (ACSA) *EdCal*, School Services of California and Dave Long & Associates; through our extensive networks aggressively recruiting candidates who meet the Board's leadership profile; correspondence with candidates; assistance with development of interview questions; scheduling of appointments; and other activities associated with the search. It also includes **at no additional cost** a leadership transition workshop with the Board and the new superintendent at the conclusion of the search.

You will find that this proposal provides an excellent overview of our services – services that can be modified in accordance with the highest standards of professionalism and your wishes. Our fundamental goal is to assist the Board in making the right match of a superintendent for your district and community.

The dedication of our advisers to finding the best match of candidates and the Board adopted leadership profile accounts for our high rate of success. We have identified Dr. Jay Hoffman as your search advisor and believe his unique background will serve Sierra Sands very well. His BIO is included.

If you have any questions about Dave Long & Associates Executive Search Services or our proposal please feel free to contact Dr. Patricia Novotney who would co-ordinate this search at (760) 567-5590 or me at (916) 616-6027. Additional information about our firm is also located on our website at www.DLAssoc.com.

Sincerely,

David Long, President
Dave Long & Associates Executive Search Services

Dave Long & Associates
Executive Search Services
is pleased to provide a proposal to the
SIERRA SANDS UNIFIED SCHOOL DISTRICT

Board of Trustees

William Farris, President

Kurt Rockwell, Vice-President/Clerk

Amy Castillo-Covert, Member

Judy Dietrichson, Member

Mike Scott, Member

Tom Pearl, Member



Dave Long & Associates

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DAVE LONG & ASSOCIATES EXECUTIVE SEARCH SERVICES

Reasons why you should choose Dave Long & Associates Executive Search Services (ESS) to assist you in the most important decision you will make as a Board . . . the selection of a new superintendent.

We're accountable to you . . . and you are in control . . .

As your advisor, DLA ESS works for you. The Board is the decision-maker, and the advisers provide logistics and vital information to the Board with which to make the best decisions. From the initial planning meeting and throughout the entire process, DLA advisers will work with you and will be available to guide you and provide direction as needed.

We develop a LEADERSHIP PROFILE . . .

Gathering information from all stakeholders in the district is one of the first and most important steps in our process. All individuals in the community – including board members, faculty, parents, and staff members – are encouraged to set up an interview with the DLA advisers to discuss the characteristics they would like to see in a new superintendent. Individuals representing groups such as bargaining units, the PTA, site council, etc., are encouraged to meet with the advisers. In addition to the interviews, the advisers may also visit various sites, hold group meetings and/or open forums, or any combination of those activities. The advisers may also receive written input from all segments of staff and the community.

We use our network to aggressively recruit top candidates . . .

Our DLA advisers, all former distinguished superintendents of schools, have had long, successful careers in education. We continue to maintain contacts and a sound network across California and the nation. Participation at conferences and workshops helps us to maintain contacts and develop new relationships with highly talented individuals. We aggressively recruit candidates, many who might not be seeking a new position, who meet the leadership profile adopted by the Board.

Our application process is rigorous . . .

Applicants are asked to respond to challenging questions and demonstrate their experience in educational leadership. Applicants provide copies of their degrees and credentials for verification as part of the process.

We use professional paper screeners . . .

DLA ESS uses professional screeners to paper screen the applicants against the criteria and leadership profile established by the Board. The screening process is designed to optimize the objective assessment of professional qualifications and experience.

We share all application materials from candidates with the Board . . .

DLA ESS maintains an open, transparent search process with the Board while ensuring maximum confidentiality for candidates. A critical part of that process is to make available to the Board all application materials received from candidates prior to determining which individuals will be invited for interviews. Our credo is "no surprises." The Board is in charge of the selection process and must be privy to all information that will help make the important decision of who will be its next superintendent.

We do thorough reference checks . . .

It is past performance, more than anything else that will predict future success. A candidate's track record is the best indicator of how he or she will perform as superintendent in your district. After a review of all applicant files, the professional screeners will develop a list of individuals who most closely meet the leadership profile. They will conduct employment and reference checks on those individuals and present recommended candidates for first round interviews, sharing with the Board the results of the reference checks.

A national organization will conduct a federal criminal search, SSN trace, credit report, state and federal sex offender registry, and motor vehicle background checks on the finalist to be offered the position. That individual will be asked to provide certified transcripts that verify his/her academic degrees and proof of administrative credential(s) in order that the district can complete its final employment process.

We actively involve stakeholders . . .

Community/Staff Engagement is included in our standard contract. It requires time in the district for the advisers to gather information about the district and its needs. There are variations of community engagement in the search process that may be selected by a Board. These would include, but are not limited to:

Community/Staff Engagement Standard Version . . .

This process includes:

- Development of advertising, data-gathering and other materials
- Individual meetings with board members
- Individual meetings with key district office and site leadership
- Individual meetings with association/union leadership
- Individual meetings with key stakeholders: parent/community/business leadership
- An open forum for general public and internal staff
- Web-based survey on district website
- Telephone interviews with key stakeholders unable to be present for individual face-to-face interviews or group meetings
- Compilation of input received through questionnaires distributed at various school district offices or e-mails sent to the adviser

We communicate with the Board throughout the entire process . . .

DLA advisers pride themselves on maintaining ongoing and timely communications with the Board throughout the entire search process. Board members will be provided with each adviser's e-mail address, cell phone number, and home contacts. In most cases an inquiry will be responded to within 24 hours, most often in a matter of hours. The advisers will also share questions from individual Board members and the answers with the entire Board in order that each member is fully apprised of the progress of the search. Our advisers will provide periodic written updates to the Board throughout the search.

We facilitate the community visit of the prospective Superintendent . . .

To affirm your choice, the entire Board, or a subcommittee of the Board, is encouraged to visit the community of the finalist. The search advisers will facilitate the visit but do not normally join the Board in the actual visitation.

We value and maintain confidentiality and communication . . .

Our search process is confidential. Confidentiality is also a top priority with the candidates' files. All applicant files are maintained in a secure area.

We assist the Board and its legal counsel in contract discussions with the successful candidate . . .

If the Board wishes, the advisers will provide assistance to the parties as the contract of employment is drafted and negotiated with the successful candidate. Our advisers, although not attorneys, know typical superintendent contract provisions desired by both candidates and boards. Even though DLA and its advisers stand ready to assist the Board, we urge boards to follow the advice of their district's attorney.

We provide at no additional cost a Board/Superintendent workshop at the conclusion of the search . . .

Upon selection of your new superintendent, a DLA adviser will provide your Board and the superintendent with a three-hour workshop to help the new governance team forge an effective working relationship. This helps the governance team immediately create a climate for open communication, develop preliminary protocols, and establish a customized orientation/transition plan. **This important workshop is included at no additional cost to the district.**

We maintain contact with the new superintendent and Board after the search has been completed . . .

Once the search has been completed, Dave Long & Associates Executive Search Services advisers maintain contact with the new superintendent and governing board for a period of up to two years. One of the reasons our advisers have such an outstanding record of successful searches where the new superintendents have withstood the test of time is due to our follow-up contacts. For the most part these are of an informal nature at no extra cost to the district. Our main goal is to ensure that the working relationship among the parties continues to be positive.

Boards who have been assisted by our advisers hire superintendents who enjoy lengthy, successful careers with the district . . .

When one examines the total number of searches performed by our advisers over the last five years, they find that 93% of the superintendents selected by these school boards are still successfully serving in those positions. This lengthy tenure is virtually unheard of in the search field. We attribute this high rate of success to extensive work done by our advisers in the search process to obtain a good match of the candidate with the board and follow-up contacts to ensure that the parties perform well as a governance team.

We offer additional services beyond the executive search services . . .

In addition to conducting executive searches, Dave Long & Associates provides a number of additional services to school districts. Our firm has three components. These are The Achievement Group, The Leadership Group, and the Executive Search Group. Each division conducts workshops, provides consulting and coaching services, and assists school districts in maximizing their governance responsibilities.

Listed below are a few of the services provided by each division:

The Achievement Group

- Curriculum and Instruction Workshops
- Instructional Coaching
- Research and Evaluation
- Assessment Support
- Measurement & Accountability Support
- Technical Assistance
- Troubleshooting

The Leadership Group

- Speaking (keynotes, presentations, etc.)
- Board/Superintendent Relationships Coaching
- Assist the District's Governance Team in Building and Maintaining Positive Board/Superintendent Relations
- Team Building
- Strategic Planning
- Coaching New Superintendents
- Assist Boards and Superintendents in Creating and Maintaining a Superintendent Evaluation System Linked to District Strategic Goals

The Executive Search Services Group

- Conduct Executive Searches
- Assist in Finding Interim Superintendents
- Consult with Boards on Resolving Conflicts Prior to the Superintendent Search
- Meet with Boards to Discuss the Executive Search Process and Review Options Available to Governing Bodies in Selecting a New CEO
- Conduct Transition Workshop when New Superintendent is Selected

At your convenience we would be happy to discuss in greater detail these additional services and price structures.

We guarantee our work . . .

We guarantee our service to your satisfaction or we will conduct the search again (*within the first year of the superintendent's contract if the Board members remain unchanged and providing the Board selected one of the candidates the DLA ESS advisers found to be professionally qualified and recommended to the Board*) for expenses only. Also, if the initial candidate pool is unsatisfactory to the Board, we will continue the search for expenses only.

TYPICAL ACTIVITIES ASSOCIATED WITH THE SEARCH

*These activities are performed in a typical search. The specific timeline and dates are determined at the first planning meeting. **Dave Long & Associates Executive Search Services will modify these activities to meet Board desires and District needs.***

1. Planning Meeting to determine scope and timeline.
Board is given binders with information to be used throughout the search.
2. Community/staff input.
3. Adviser drafts brochure and board approves. Position is advertised. Adviser begins to assist board in developing interview questions.
4. Applications close.
5. Paper screening. Screening committee evaluates applicant materials against the position profile.
6. Screening committee performs employment and reference checks on best-qualified applicants and recommends individuals for board interview.
7. Board receives screening committee report and determines candidates for first round interviews. Board is given copies of each candidate's application, and the complete files are available for the board to review. Adviser assists the Board to complete the development of questions for first round interviews.
8. Candidates are notified and interviews scheduled. Interview questions and copies of candidates' materials are copied for interview packets.
9. Interviews by Board.
10. Board determines candidates for second round interviews. Adviser assists with refining questions for the second round interviews.
11. Board conducts second round interviews. Adviser begins to notify unsuccessful candidates.
12. Board makes tentative selection of its prospective superintendent. Adviser requests federal criminal and related background check on finalist to be offered the position.

13. Board visits community of Board's selected finalist. Facilitated by adviser. Adviser does not accompany board on visitation.
14. Board selects new superintendent.
15. Board takes action to hire superintendent and introduce to community.
16. Dave Long & Associates Executive Search Services schedules a three-hour **LEADERSHIP TRANSITION** work session with board and new superintendent to help forge an effective working relationship. **(No additional charge)**

RECOMMENDED ACTIVITIES FOR THE SIERRA SANDS UNIFIED SCHOOL DISTRICT SEARCH

The steps outlined above incorporate our recommendations to the SIERRA SANDS UNIFIED SCHOOL DISTRICT as to how we believe the search should be conducted. We believe the search should be conducted throughout California in order to secure the largest possible field of candidates that meet the Board's adopted leadership profile.

We recommend that the selection process be closed in that stakeholder involvement would be held to providing input on the qualities, traits, experience, and training of the ideal candidate. Under this approach there would be no separate interview panels composed of stakeholders to meet with applicants. All activities after the community, staff, and other interest groups in the district have provided input as to a leadership profile would be accomplished by the Governing Board and adviser in a closed setting as permitted by the Brown Act.

Over the years we have found that this approach affords the greatest confidentiality for candidates and ultimately yields the best field of applicants. Some candidates, particularly seated superintendents, will not make application to a district using interview panels composed in part or entirely of stakeholders. It is also well-established that the hiring of the superintendent is the sole responsibility of the Governing Board composed of trustees elected by the public. As such their responsibilities cannot be delegated to other individuals or groups.

We also recognize that local conditions may require a more "hands on" degree of involvement by stakeholders. We would be pleased to discuss these variations and their possible ramifications with you. Depending on the type of stakeholder involvement required above and beyond that suggested in this proposal, the amount of consultant time involved to assist additional participants in the search process could be increased. In that case there might be a modest increase in the fees quoted in this proposal.

Dave Long & Associates Executive Search Services
Partial List of Searches Completed by Our Advisers

<u>District ADA</u>	<u>Name of District</u>	<u>District ADA</u>	<u>Name of District</u>
12,500	New Haven USD	24,000	Grossmont Union HSD
10,500	Natomas USD	1,380	Mother Lode Union SD
310	Hughes-Elizabeth Lakes Union ESD	17,915	Murrieta Valley USD
19,000	Val Verde USD	3,720	Santa Paula ESD
6,000	Lawndale ESD	30,000	Modesto City Schools
3,600	Gateway USD	2,900	Coronado USD
2,072	Old Adobe Union ESD	7,400	San Jacinto USD
3,000	Rincon Valley USD	23,000	Palm Springs USD
1,500	Mark West Union SD	3,712	Santa Paula ESD
640	Curtis Creek ESD	4,410	Placerville Union ESD
9,045	Pittsburg USD	5,144	Benicia USD
18,082	Pajaro Valley USD	6,000	Ukiah USD
1,730	John Swett USD	1,150	Fall River Joint Unified SD
16,700	Paramount USD	900	Esparto USD
7,137	Perris Union HSD	2,500	Healdsburg USD
3,300	Redding SD	42,000	San Juan USD
7,000	Claremont USD		

AGREEMENT FOR ASSISTANCE

SIERRA SANDS UNIFIED SCHOOL DISTRICT (hereafter District) and Dave Long & Associates Executive Search Services (hereafter DLA).

DLA AGREES

1. To meet with the governing board of the SIERRA SANDS UNIFIED SCHOOL DISTRICT (hereafter Board) as required to assist and advise it throughout the search.
2. To meet with individuals and groups, including board members, employees, community members, and others who express an interest in the selection process. In the interest of an orderly and timely process, DLA may, in its discretion and after consulting with the Board, limit the number and time of such meetings.
3. To develop for Board approval and electronically distribute a recruiting brochure announcing the position.
4. To recruit candidates that DLA believes are qualified for the position.
5. To answer inquiries from interested persons concerning the position.
6. To collect and process applications and communicate with persons applying for the position.
7. To recommend qualified people to aid in the recruitment and selection process as necessary.
8. To conduct employment and reference checks on candidates recommended to the Board for interviews.
9. To assist the Board in preparing for candidate interviews.
10. To notify all unsuccessful candidates and thank them for applying.
11. To request a criminal and related background check on the finalist selected by the Board as its prospective superintendent.
12. To facilitate a Board visit to the community of the board's selected individual.
13. To hold the district harmless, indemnify and defend the district from any and all liability arising from the search and recruitment activity referred to herein, unless such liability resulted from negligence or malfeasance by the district or Board. The Board agrees to notify DLA within a reasonable time of receipt of any claim.

DISTRICT AGREES

1. To have all board members present at all meetings regarding the selection.
2. To have at least one or two members of the Board visit the community of the prospective superintendent to obtain satisfactory assurance of the individual's acceptability.

3. To pay any and all expenses incurred by the district board members in connection with the superintendent selection process.
4. To pay the travel expenses of second round candidates to be interviewed.
5. To make appropriate facilities available for conducting interviews and other business related to the search in progress.
6. To complete the final employment process.
7. To have legal counsel develop or review any agreement between the Board and the prospective superintendent.
8. To hold DLA and advisers/professional screeners it may use harmless, indemnify and defend DLA, its advisers/professional screeners from any and all liability arising from the search and recruitment activity referred to herein unless such liability resulted from negligence or malfeasance by DLA. DLA agrees to notify the district or Board within a reasonable time of the receipt of any claim.

MISCELLANEOUS

This agreement may be terminated at any time by either party by giving written notice to the other. At such time, the district shall be invoiced by DLA for services and expenses incurred for work accomplished to date.

CONSIDERATION

1. In consideration for the above services, the district agrees to pay DLA an all inclusive fee of **\$14,400 for the search recommended in this proposal.**
2. One-half of the fee, **\$7200.** is due and payable upon execution of this agreement by both parties. The remainder of the fee is due and payable upon receipt of an invoice at the conclusion of the search.
3. DLA guarantees its services to District's satisfaction or DLA will conduct the search again *(within the first year of the superintendent's contract if the board members remain unchanged and providing the board selected one of the candidates the DLA professional screeners found to be professionally qualified and recommended to the board)* for expenses only. In the event the initial field of candidates is not satisfactory to the Board, DLA will continue the search process for expenses only.

For purposes of communication between the parties, the following shall be deemed to be representative of the parties:

**SIERRA SANDS UNIFIED
SCHOOL DISTRICT**

William Farris
Board President

SIERRA SANDS UNIFIED SCHOOL DISTRICT
113 Felspar Avenue
Ridgecrest, CA 93555

Phone: (760) 499-1600

Signature

Date

**DAVE LONG &
ASSOCIATES**

Dave Long
President
Executive Search Services

Dave Long & Associates
Executive Search Services
636 Loretta Drive
Laguna Beach, CA 92651

Phone: (916) 616-6027

Signature

Date

BIOGRAPHICAL INFORMATION

DAVID LONG, Ph.D.

Dr. David Long was appointed by Governor Arnold Schwarzenegger as the Secretary of Education in March 2007. In that role, he served as policy advisor to the Governor on education issues. Dr. Long has more than 40 years of experience in the field of education, ranging from 21 years of classroom teaching to the superintendency. He obtained his Ph.D. from Iowa State University. Prior to his appointment by the Governor, Dr. Long was the Riverside County Superintendent of Schools.

In 2008 after leaving the Secretary of Education position, he formed Dave Long & Associates. This is a full-service educational leadership organization that assists school districts in improving student performance, effectively using data for informed decision-making, building effective governance teams and conducting superintendent searches.

Dr. Long is the immediate past President of the California County Superintendents Educational Services Association (CCSESA). He was named Chairperson of the Federal Education Safe and Drug Free Schools and Community Advisory Committee by former Secretary of Education Margaret Spellings. He has been honored as California Administrator of the Year by the National Organization of Partners in Education, Superintendent of the Year, and received the Governor's Award for school leadership. He was also honored as the Inland Empire Entrepreneur of the Year for his innovative approach to raising student achievement through the Riverside County Achievement Teams.

He has also received the prestigious Marcus Foster Memorial Award from the Association of California School Administrators for outstanding leadership and significant contributions to public education by a school administrator.

Dr. Long is deeply involved in communities. He is one of the First 5 Riverside commissioners, earned the Lifetime Achievement Award from 23rd District PTA, and Lifelong Learning Award from the Boy Scouts of America.

Dave and his wife, Joanne, a principal in the Corona-Norco Unified School District, have two daughters, Angelica and Vika. In addition, Dr. Long has four adult children and 15 grandchildren.

BIOGRAPHICAL INFORMATION

PATRICIA B. NOVOTNEY, Ed.D.

Dr. Patricia Novotney brings a wealth of experience and accomplishments to our firm and is recognized as an outstanding leader in the field of education. Prior to joining Dave Long and Associates Executive Search Services, Dr. Novotney was a member of the faculty of the University of LaVerne. She was an Associate Professor in the Department of Organizational Leadership. She also served as the Program Chair for the Professional Administrative Services Credential Program as well as being a full time faculty member in the doctoral program.

Before her work at the university, Dr. Novotney spent thirty-six years in public school district service. The majority of her work was in school administration where she was a principal in three southern California school districts- Fountain Valley, Ocean View and Irvine Unified. She was superintendent in two California school districts -Temecula Union School District and Temecula Valley Unified where she served for thirteen years. During this time period, Dr. Novotney facilitated the overall master planning for the district while it transitioned from a rural unincorporated area to a unified school district. Dr. Novotney has also been an Adjunct Professor teaching masters' and doctoral level classes at Pepperdine University, the University of Southern California, Chapman University and the University of California at Fullerton, Long Beach and San Bernardino.

In addition to her other professional activities Dr. Novotney has served as an advisor to public school district boards of education in matters related to administration and governance. She has also been a consultant for public, private and non-profit organizations. As an example, she worked with a Tribal Council of an American Indian tribe for the purpose of advising them in facilities planning, policy and protocol development, Governance Team Leadership, recruitment and training of personnel and preparation for accreditation. She has also conducted workshops and training sessions in Strategic Planning and Team Building.

Dr. Novotney co-authored three books dealing with organizational leadership and Superintendent and Governing Board practices. These were titled: EIGHT AT THE TOP: A VIEW INSIDE PUBLIC EDUCATION, EFFECTIVE SUPERINTENDENT-SCHOOL BOARD PRACTICES-STRATEGIES for DEVELOPING and MAINTAINING GOOD RELATIONSHIPS WITH YOUR BOARD; and THE SUPERINTENDENT'S PLANNER- A MONTHLY GUIDE AND REFLECTIVE JOURNAL.

Dr. Novotney received her B.S. degree from Bloomsburg State University, Bloomsburg, Pennsylvania, a Master's degree in Educational Administration from Chapman University, Orange, California and her doctoral degree in Institutional Management from Pepperdine University, Los Angeles, California.

BIOGRAPHICAL INFORMATION

JAY N. HOFFMAN, Ed.D

Dr. Jay Hoffman has been involved in public education since 1973, serving as a teacher of regular and special education, assistant principal, principal, Director of Curriculum and Personnel, Assistant Superintendent of Educational Support Services, and Superintendent for the last 14 years of his career. During that time, he was selected to serve as a member of California's Fiscal Crisis Management Assistance Team. In addition, the Association of California School Administrators honored Dr. Hoffman as the 2007 recipient of The Marcus Foster Memorial Award for Administrative Excellence.

In addition to his work as a public school administrator, Dr. Hoffman served for over 20 years as an Adjunct Professor working with Masters candidates at Chapman University, and Doctoral candidates at the University of La Verne. During his tenure as a university professor, he chaired over 30 doctoral dissertations.

In 2012, Dr. Hoffman was elected to a four year term to serve on the Riverside County Board of Education. The County Board Riverside County serves over 450,000 students in 23 school districts and in special programs administered by the Riverside County Office of Education. An important responsibility of the Board is to conduct appeals brought forth by parents and students wishing to change the outcomes of expulsion hearings and inter-district transfer requests. The Board also provides oversight for a number of charter schools.

Subsequent to his 2010 retirement as Superintendent, Dr. Hoffman has worked with school district superintendents and their Boards providing workshops often focused on clarifying the different responsibilities of Board Members and the Superintendent.

More recently, Dr. Hoffman has been appointed by Riverside County Supervisor Marion Ashley to serve as his Education Liaison. This is a new model for Riverside County, creating additional pathways to plan, problem solve, and innovate educational offerings.

Dr. Hoffman earned a Bachelor of Arts Degree at California State University, Northridge. At California State University, Fullerton, he earned a Master of Science Degree in School Administration, which was accompanied by the Edwin Carr Fellowship, awarded on the basis of his potential for *"Making a significant contribution to the quality of education in California."* Jay Hoffman earned his Doctorate in Education in 1992. His doctoral dissertation was titled *Unification in Five Southern California School Districts: A Case Study*.

Jody Rummer

From: Linda Hunt <lhunt@leadershipassociates.org>
Sent: Wednesday, October 16, 2013 12:05 PM
To: Jody Rummer
Cc: Michael Escalante; rtownsend@leadershipassociates.org Townsend;
plynch@leadershipassociates.org Lynch
Subject: Search Proposal
Attachments: Sierra Sands Proposal to District 10.16.13.pdf

Good morning Superintendent Rummer,

On behalf of Leadership Associates, Mike Escalante and Rene Townsend are pleased to present a proposal to conduct a search for the new Superintendent of the Sierra Sands Unified School District. The attached pdf document comprises our proposal and includes the following:

1. Proposal Letter
2. Cost Analysis and sample contract
3. Overview of the Search Process
4. List of Searches
5. Board Member Recommendations
6. Leadership Associates' Profile and contact information
7. Consultant Biographical Information: Mike Escalante, Rene Townsend

If you have any questions or require further information, please contact Mike Escalante

Regards,

Linda Hunt
Administrative Assistant
Leadership Associates



**LEADERSHIP
ASSOCIATES**
*California's Premiere Executive
Search Firm*

PROPOSAL TO CONDUCT A SUPERINTENDENT SEARCH

For



**SIERRA SANDS
UNIFIED SCHOOL DISTRICT**

October 2013



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Larry Aceves
Kent L. Bechler
James R. (Jim) Brown
Michael F. Escalante
Sally Frazier
Gwen E. Gross
Don Iglesias
Peggy Lynch
Phil Quon
Dennis M. Smith
Rich Thome
Rene Townsend

October 16, 2013

Board of Trustees
Sierra Sands Unified School District
Attention: Joanna Rummer, Superintendent
113 W. Felspar Avenue Ridgecrest, CA 93555

Dear Board Members:

Our firm, *Leadership Associates*, is pleased to submit a proposal to conduct the search for the new Superintendent of the Sierra Sands Unified School District.

Leadership Associates has conducted over 290 superintendent searches in California since 1996. If our firm is selected, Dr. Michael Escalante, former Superintendent of Glendale Unified School District and Fullerton Joint Union High School District, and Dr. Rene S. Townsend, former Superintendent of Coronado and Vista Unified school districts, will be actively involved in the identification and recruitment of superintendent candidates throughout the entire search. Biographical information is included in the backup material. In addition, all other partners in the firm will actively support their recruitment and processing efforts to benefit your district.

As you know, selecting a superintendent is one of the most important responsibilities of a Board of Trustees and should be undertaken with great care. We have a strong record of success working with a wide variety of school districts throughout California. In addition, we have the contacts and expertise that enable us to guide the Board through the entire process and present an excellent slate of candidates who match the District's unique attributes and needs, such as the following:

- Recognition as a high performing district with dedicated and committed employees
- Rich tradition of excellence in education with a commitment to provide a world-class education for all students
- Effective community relations and continued commitment to the building of partnerships with your District's families and community stakeholders
- Diversity, with a supportive community and involved parents
- Access to higher education opportunities for students
- Excellent Board of Trustees that is recognized for its stability and commitment to student needs

All of our partners are involved in recruitment in every search in order to be assured that all potential, qualified candidates are contacted. We are committed to working with your Board, staff and community to assist in the selection of the next superintendent for the Sierra Sands Unified School District.

Our firm believes we perform four major tasks for the Board:

- Assist the Board of Trustees in developing a personal and professional profile for the new superintendent that includes input from staff, parents, the business community and local government leaders. We believe that involvement of these groups is critical and we have a record of success in involving them in the search process
- Recruit candidates who closely match the locally developed profile. We take great care in making sure that we know your community and the needs of the District in order to ensure that the profile of the next superintendent is well defined. Often the top candidates are successful leaders who are not contemplating a move. These people must be personally contacted and encouraged to apply. Our consultants know and have the network of contacts that enable us to recruit top candidates throughout the state and nation
- Conduct in-depth reference checks on the applicants. We use our vast network of contacts and also use databases to make certain that reliable and in-depth information is gathered on each candidate. This is a critical step and our firm spends a great deal of time assuring that we know the candidates, their background and history so that the Board of Education has all pertinent information as it deliberates on selecting a pool of candidates to interview and make its final selection
- Work closely with the Board throughout the entire professional search process. We keep the Board informed while maintaining the confidentiality of the candidates. Successful superintendents and others will not apply if they feel their confidentiality is prematurely breached

We are proud of our work and our commitment to serving our clients well, and believe our references confirm we are highly qualified to conduct the Albany Unified School District search. We look forward to an opportunity to meet with the Board Members.

Included in the backup materials are the following:

- An Overview of the Superintendent Search Process/Scope of Services
- A cost analysis to conduct the search and sample contract. Please note Leadership Associates includes all expenses in its cost.
- Leadership Associates' Profile and contact information
- Consultants' biographical information
- A list of districts where we have conducted searches
- Board Member Recommendations

Board of Trustees
Sierra Sands Unified School District
October 16, 2013
Page 3

We have recently concluded successful searches in San Ramon Valley Unified, Mt. Diablo Unified, Corcoran Jt. Unified, Vacaville Unified, Kentfield Elementary, and Sylvan Union school districts. Please do not hesitate to contact me at the following: . if you have questions or require additional information. We look forward to hearing from you.

Sincerely,

Mike Escalante
Michael Escalante, Ed.D

Rene Townsend
Rene Townsend, Ed.D



Overview of Superintendent Search Process for Board of Trustees

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. **Our meetings with you are *italicized* and marked with an asterisk*.**

***Initial Meeting with the Board**

This is our first meeting with you once we have been selected to represent your district. At this meeting we will discuss the following with you: the characteristics you are looking for in your 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 your commitment to meeting dates; Board 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, other matters the Board may wish to discuss.

Community and Staff Input

We meet with the individuals and groups per your request. We share the search process, timeline, answer questions and then solicit input regarding the desired qualities, characteristics, background and experiences of the new superintendent, as well as the key characteristics of the district's culture, district strengths, and future challenges and issues. We spend the time necessary to ensure full input. Opportunities are provided for people to contact us via email, fax or telephone if they were unable to attend the meetings, would like to provide additional information, or prefer to submit their ideas in this manner.

We prepare a thorough report containing the comments from each group, 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.

Position Description

The position description is prepared reflecting the input we receive 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 then posted on our website and distributed widely and can be posted on the district's website.

Advertising, Recruitment, Reference Checking

After our meetings with the Board, staff and community, we advertise, actively recruit and conduct reference and data base checks on all potential candidates. These are very critical activities when we work very hard to find the candidates that best match the district's desires and needs. We verify degrees, credentials and professional experiences. We keep the Board posted on a regular basis about the progress of the search.

***Selection of Finalists**

This meeting takes 3 - 4 hours. In addition to discussing the candidates we recommend you interview, we will review all applicants explaining our rationale for recommending some and not others. The Board, however, makes the final decision on those to be interviewed, determines the interview schedule and location. We offer sample interview questions and assist the Board in finalizing them. In addition to making the 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.

***Final Interviews**

The board conducts the interviews with the consultants observing and handling all the logistics. We facilitate discussions assisting the Board as needed to assist 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.

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.

Public Approval of the New Superintendent

Following the validation visit, the Board takes public action to employ the new superintendent.

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.

Throughout the process Leadership Associates will be available to answer any questions you may have.



LEADERSHIP ASSOCIATES

COST ANALYSIS

Sierra Sands Unified School District Superintendent Search - 2013

TOTAL FEE FOR ENTIRE SEARCH

**Not to exceed \$21,500
(Tiered search with prorated fee per
attached sample contract)**

This fee includes:

- All meetings with the Board
- Development of a "Position Description" for website posting
- Cost of advertising in EdCal
- Accept applications and respond to all inquiries regarding the position.
We assume all clerical expenses
- Recruit candidates and do extensive background checks
- Gather community and staff input and provide Board with a written report
- Coordinate the logistics of the search:
 - scheduling appointments
 - notification of unsuccessful candidates
 - scheduling community visit
- Assist in the development of interview questions
- Act as an advisor to the Board of Trustees
- Provide an optional transitional workshop (content to be determined with Board and new Superintendent)



LEADERSHIP ASSOCIATES

50-855 Washington Street #C-205

La Quinta, CA 92253

Phone/Fax (760) 771-4277

AGREEMENT FOR CONSULTANT SERVICES

THIS AGREEMENT is made this **18th** day of **October, 2013**, between **LEADERSHIP ASSOCIATES**, hereinafter called the Contractor, and **SIERRA SANDS 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.

The District agrees to pay the Contractor **TWENTY-ONE THOUSAND, FIVE HUNDRED DOLLARS (\$21,500)** for services provided. Payment is to take place in three increments: (1) **\$10,750 (50%)** upon the completion of staff and community input, (2) **\$6,450 (30%)** upon completion of recruitment and reference checking, and (3) **4,300 (20%)** upon completion of the search. The Contractor will submit invoices to the District for each of the payment increments. Payments are due within 30 days of receipt of invoice.

The parties agree that:

1. Upon completion of the meetings with the community and staff to gather input regarding desired qualities and characteristics of the new superintendent, the consultants will meet with the Board to summarize the comments received. The Board will then determine whether to proceed with a full search or modify the process as needed; e.g., use an open until filled process. If the Board decides not to continue with the search, then the search will be terminated and Leadership Associates will charge the district 50% of the original contract amount.
2. If the Board continues with the search, Leadership Associates will proceed with the recruiting and reference checking phases of the search. Upon completion of this phase, Leadership Associates will meet with the Board and review the candidate pool. Leadership Associates will recommend certain candidates for an interview and explain why others are not being recommended. The Board will then determine whether to proceed with the interview phase or select a particular candidate. If the Board selects a candidate, the search will be terminated and Leadership Associates will charge the district an additional 30% of the original proposal amount. The total search payment will therefore be 80% of the original proposal amount.
3. If the Board continues with the search, Leadership Associates will move forward with the final phases of the search and, upon completion, will invoice the District the remaining 20% of the original proposal amount.

The Contractor is to perform the above services beginning **OCTOBER 18, 2013**

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.

In accordance with Education Code Section 39656, this contract is not valid or an enforceable obligation against the District until approved or ratified by motion of the governing board duly passed and adopted.

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

DISTRICT:
SIERRA SANDS UNIFIED SCHOOL DISTRICT

By _____
Name MICHAEL ESCALANTE
Date OCTOBER 18, 2013

By _____
Name _____
Date _____

SAMPLE



Leadership Associates' Profile

Leadership Associates has conducted over 290 searches in California since 1996. We have 12 partners, all active educators and former, successful California superintendents who reside throughout the state – north, south, central valley. While we are dedicated to California school districts, we have networks throughout the country and have assisted School Boards in finding top candidates from outside the state.

A few other facts about the firm:

- All keep superintendent searches as their core work
- All have national and state-wide networks and alliances including ACSA, CALSA, Northern and Southern Superintendents, City Superintendents, AASA, and Suburban School Superintendents
- All belong to organizations which include top and emerging leaders
- Three were California state superintendents of the year
- One has been a candidate for California state superintendent of public instruction
- Three chaired the California state superintendents committee for ACSA; two were president of ACSA
- Three 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, 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
- Three are authors of *A Practical Guide to Effective School Board Meetings*; three have co-authored 3 other books: *Eight at the Top*, *Superintendent-School Board Practices*, and *The Superintendent's Planner*



GENERAL INFORMATION

- (1) Firm name, address and point of contact for this proposal:

Leadership Associates
50-855 Washington Street, #C-205
La Quinta, CA 92253

- (2) Telephone: (760) 771-4277 Facsimile 760) 771-4277

Firm Web Address: www.leadershipassociates.org

Point of Contact Email: Lhunt@leadershipassociates.org

- (3) Type of firm: **Partnership**

- (4) Names and titles of all principals/officers/partners of the firm:

Name	Title
<u>Peggy Lynch, Ed.D</u>	<u>Managing Partner</u>
<u>Larry Aceves</u>	<u>Partner</u>
<u>Kant L. Bechler, Ph.D</u>	<u>Partner</u>
<u>James R. (Jim) Brown</u>	<u>Partner</u>
<u>Michael Escalante, Ed.D</u>	<u>Partner</u>
<u>Sally Frazier, Ed.D</u>	<u>Partner</u>
<u>Gwen E. Gross, Ph.D</u>	<u>Partner</u>
<u>Don Iglesias</u>	<u>Partner</u>
<u>Phil Quon</u>	<u>Partner</u>
<u>Dennis M. Smith, Ed.D</u>	<u>Partner</u>
<u>Rich Thome</u>	<u>Partner</u>
<u>Rene Townsend, Ed.D</u>	<u>Partner</u>

- (5) Point of Lead Consultants to be assigned if contract is awarded:

Name	Title
<u>Michael Escalante, Ed.D</u>	<u>Partner</u>
<u>Rene S. Townsend, Ed.D</u>	<u>Partner</u>

❖ **MICHAEL “Mike” ESCALANTE**

Biographical Information

- Mike served as Superintendent of the Glendale Unified School District in Los Angeles County and the Fullerton Joint High School District in North Orange County for a total of 13 years, 6 ½ in each district.
- During Mike's career he has had served as Assistant Superintendent of Business, and Principal at the Elementary, Middle and twice at the High School levels. He has also taught at the elementary, high school and university levels.
- Mike earned his BA from San Diego State University, Masters in Education from Loyola Marymount University and Doctorate in Educational Leadership from the University of Southern California.
- Currently, Mike serves as a doctoral level instructor at the University of Southern California Rossier School Of Education. He currently teaches educational leadership and has responsibility for chairing doctoral dissertations. Mike's current academic interest is in the area of building effective board superintendent relationships.
- Mike comes from a family of public school educators with his mother serving as a teacher, principal and school board member in Hawthorne Elementary School District. His father, a small businessman, served for 16 years on the Board of Education of the Centinela Valley Union High School District.
- Mike has been involved in his communities in Rotary International, Optimist International, Boy Scouts, and YMCA and was honored five times with Parent Teacher Associate Honorary and Continuing Service Awards.
- During Mike's 38 year career in public education, he has served in professional organizations including Association of California School Administrators (ACSA), The USC Dean/ Superintendent Advisory Committee Southern (DSAG), Southern California Superintendents, Urban Superintendent Dialogue, Educational Research Development Institute (ERDI), California Latino Superintendents' and Administrators' Association (CALSA), Association of Latino Administrators and Superintendents (ALAS), and even California Teachers' Association (CTA), where he served as President of the Hawthorne Teachers' Association.
- Mike's two sons are graduates of California State University Fullerton.



❖ RENE S. TOWNSEND

Biographical Information

- Rene S. Townsend, former managing partner of Leadership Associates, works with new and experienced superintendents, and board-superintendent teams on governance, teamwork, and the superintendent's evaluation.
- Previously, Rene was Director Education Outreach for Price Charities, focusing on urban education and philanthropic work with schools in Central America.
- Rene served as Superintendent of Schools for Coronado Unified School District. She also served as Superintendent of the Vista Unified School District. Previously she served students as teacher, principal, and associate superintendent.
- She received her B.A. from the University of Washington, her Master's from San Diego State University, and her Doctorate from Northern Arizona University.
- Rene chaired the ACSA State Superintendency Committee, the annual California State Superintendents' Symposium, and the Superintendent's Committee for San Diego and Imperial Counties. She is on the national boards of AVID (Advancement Via Individual Determination), ESR (Educators for Social Responsibility) and UED (Urban Education Dialog).
- She received the Robert F. Alioto Award for California for Instructional Leadership, 74th Assembly District Woman of the Year, San Diego Mediation Center Peacemaker, California Interscholastic Federation Contributions, and is a member of the Phi Kappa Phi Academic Honor Society.
- Rene co-authored *A Practical Guide to Effective School Board Meetings* with Leadership Associates partners Walt Buster and Jim Brown. With other colleague superintendents, Rene co-authored *Eight at the Top* and *Effective Superintendent-School Board Practices*.



Leadership Associates

STAFF AND PARTNER INFORMATION

Staff

Name: Linda Hunt
Title: Administrative Assistant
Background: Served more than 17 years in California public school district. 9 years as administrative assistant to the superintendent; was involved in three superintendent searches during tenure. Will assist District superintendent's assistant throughout entire search

Partners

Name: Peggy Lynch, Ed.D
Title: Managing Partner
Background: Former superintendent, Brea Olinda USD and San Dieguito Union SD. See attached biographical information

Name: Larry Aceves
Title: Partner
Background: Former superintendent, Franklin-McKinley and Alum Rock School Districts. Former candidate, State Superintendent of Public Instruction. See attached biographical information

Name: Kent L. Bechler, Ph.d
Title: Partner
Background: Former superintendent, Duarte, Walnut Valley and Corona-Norco Unified School Districts. See attached biographical information

Name: James R. (Jim) Brown
Title: Partner
Background: Former superintendent, Glendale, Palo Alto and Lompoc Unified School Districts, and Cambria Union Elementary and Coast Union High School Districts. See attached biographical information

Name: Michael Escalante, Ed.D
Title: Partner
Background: Former superintendent, Glendale Unified and Fullerton Joint Union High School District. See attached biographical information

Name: Sally Frazier, Ed.D
Title: Partner
Background: Former Madera County Superintendent of Schools. See attached biographical information

Name: Gwen E. Gross, Ph.D
Title: Partner
Background: Former superintendent, Irvine, Beverly Hills, Manhattan Beach and Ojai Unified School Districts and Hermosa Beach City School District. See attached biographical information

Name: Don Iglesias
Title: Partner
Background: Former superintendent, San Jose Unified School District. See attached biographical information

Name: Phil Quon
Title: Partner
Background: Former superintendent, Union and Cupertino Union School Districts. See attached biographical information

Name: Dennis M. Smith, Ed.D
Title: Partner
Background: Former superintendent, Placentia-Yorba Linda, Irvine, Cajon Valley and Laguna Beach Unified School Districts, and Orange County Public Schools, Florida. See attached biographical information

Name: Rich Thome
Title: Partner
Background: Former superintendent, South Bay Union and Cardiff Elementary School Districts. See attached biographical information

Name: Rene Townsend, Ed.D
Title: Partner
Background: Former superintendent, Coronado and Vista Unified School Districts. See attached biographical information



LEADERSHIP ASSOCIATES

Partial Listing of Search Projects

District	County	ADA
Elk Grove USD	Sacramento	56,000
Corona-Norco USD	Riverside	53,100
Sacramento City USD	Sacramento	52,757
Capistrano USD	Orange	50,000
Moreno Valley USD	Riverside	38,000
Clovis USD	Fresno	38,000
Saddleback Valley USD	Orange	35,500
Poway USD	San Diego	32,189
Orange USD	Orange	30,221
Glendale USD	Los Angeles	30,000
Sacramento COE	Sacramento	30,000
Desert Sands USD	Riverside	29,200
San Ramon Valley USD	Contra Costa	28,986
Bakersfield SD	Kern	28,321
Placentia-Yorba Linda USD	Orange	27,000
Bakersfield City	Kern	26,600
San Ramon Valley USD	Contra Costa	26,000
Lodi USD	San Joaquin	25,800
Irvine USD	Orange	25,000
Torrance USD	Los Angeles	24,055
Fairfield-Suisun USD	Solano	24,000
West Covina USD	Los Angeles	23,900
Hayward USD	Alameda	23,500
Conejo Valley USD	Ventura	22,400
Downey USD	Los Angeles	22,000
Lake Elsinore USD	Riverside	22,000
Hemet USD	Riverside	21,977
Oceanside USD	San Diego	21,075
Pasadena USD	Los Angeles	21,000
Anaheim City SD	Orange	20,000
Alhambra City SD	Los Angeles	19,800
Pajaro Valley USD	Santa Cruz	19,000
Escondido Union SD	San Diego	18,700
Folsom Cordova USD	Sacramento	18,500
Modesto City Schools	Stanislaus	18,000
Rowland USD	Los Angeles	18,000
Hemet USD	Riverside	17,544
Napa Valley USD	Napa	16,354
Oxnard SD	Ventura	15,554
Huntington Beach Union HSD	Orange	14,800
Panama Buena Vista USD	Kern	14,700
Walnut Valley USD	Los Angeles	14,658
Santa Clara USD	Santa Clara	14,155
Pleasanton USD	Alameda	14,106
Fullerton SD	Orange	13,890
Tracy Joint USD	San Joaquin	13,529
Covina Valley USD	Los Angeles	13,400

Upland USD
 Natomas USD
 San Dieguito Union HSD
 Oak Grove Elementary
 Santa Monica-Malibu USD
 San Lorenzo USD
 Merced City
 Lompoc USD
 Lucia Mar USD
 Monterey Peninsula USD
 Alameda USD
 San Mateo-Foster City SD
 Placentia-Yorba Linda USD
 South Bay Union SD
 West Covina USD
 Carlsbad USD
 Milpitas USD
 Palo Alto USD
 Franklin-McKinley Elementary SD
 Berkeley USD
 Los Alamitos USD
 Ocean View SD
 Ceres USD
 South San Francisco USD
 San Leandro USD
 San Mateo Union HSD
 Los Banos USD
 Murrieta Valley USD
 Novato USD
 Santa Cruz City ESD
 Brentwood Union SD
 Santa Maria Joint Union HSD
 Newark USD
 Alta Loma ESD
 Glendora USD
 San Luis Coastal USD
 Campbell Union SD
 Sylvan Union ESD
 Newark USD
 Claremont USD
 Whittier City ESD
 Charter Oak USD
 Selma USD
 Roseville Joint Union HSD
 Santee SD
 Ukiah USD
 Buena Park ESD
 El Dorado Union HSD
 Jefferson ESD/Daly City
 Dinuba USD
 Sunnyvale ESD
 Encinitas Union ESD
 Temple City USD
 Selma USD
 Benicia USD
 Beverly Hills USD
 Culver City USD
 Sonoma Valley USD
 Orcutt Union ESD
 Acalanes Union HSD
 Duarte USD
 Placer Union HSD
 Eureka City USD
 Mt. View-Whisman ESD

San Bernardino	12,600
Sacramento	12,300
San Diego	12,000
Santa Clara	11,800
Los Angeles	11,723
Alameda	11,528
Merced	11,500
Santa Barbara	11,000
San Luis Obispo	10,900
Monterey	10,800
Alameda	10,700
San Mateo	10,342
Orange	10,325
San Diego	10,200
Los Angeles	10,089
San Diego	10,000
San Jose	10,000
Santa Clara	10,000
Santa Clara	9,900
Alameda	9,700
Los Angeles	9,500
Orange	9,461
Stanislaus	9,200
San Mateo	9,000
Alameda	8,700
San Mateo	8,626
Merced	8,500
Riverside	8,300
Marin	7,900
Santa Cruz	7,000
Contra Costa	7,800
Santa Barbara	7,800
Alameda	7,500
San Bernardino	7,500
Los Angeles	7,500
San Luis Obispo	7,500
Santa Clara	7,400
Stanislaus	7,400
Alameda	7,100
Los Angeles	6,900
Los Angeles	6,784
Los Angeles	6,600
Fresno	6,500
Placer	6,400
San Diego	6,324
Mendocino	6,214
Orange	6,096
El Dorado	6,000
San Mateo	6,000
Tulare	5,800
Santa Clara	5,730
San Diego	5,600
Los Angeles	5,588
Fresno	5,500
Solano	5,400
Los Angeles	5,300
Los Angeles	5,300
Sonoma	5,000
Santa Barbara	4,961
Contra Costa	4,800
Los Angeles	4,700
Placer	4,700
Humboldt	4,562
Santa Clara	4,500

Buckeye Union ESD
 Valley Center-Pauma USD
 Coalinga-Huron Joint USD
 Moreland ESD
 Cypress ESD
 South Pasadena USD
 Lindsay USD
 Moreland SD
 Eureka City USD
 Tamalpais Union HSD
 Goleta Union SD
 Oak Park USD
 Cabrillo USD
 Lowell-Joint ESD
 San Marino USD
 Los Gatos Union ESD
 Corcoran Joint USD
 Cambrian ESD
 Ojai USD
 San Benito HSD
 Exeter Public Schools
 Los Gatos-Saratoga Joint UHSD
 San Bruno Park ESD
 El Segundo USD
 Laguna Beach USD
 Mountain View-Los Altos Union HSD
 San Benito HSD
 Rincon Valley Union ESD
 Solana Beach ESD
 San Carlos SD
 Menlo Park SD
 Dos Palos-Oro Loma Joint USD
 Orinda Union SD
 Los Gatos Union SD
 Galt JUHSD
 Carmel USD
 Fowler USD
 Mill Valley ESD
 Scotts Valley USD
 Kelseyville USD
 Willits USD
 Golden Valley USD
 Winters Joint USD
 Chowchilla ESD
 Ross Valley ESD
 Sonoma Union HSD
 Lammersville ESD
 Mark West Union SD
 Del Mar Union SD
 Las Lomitas ESD
 Santa Ynez Valley Union HSD
 Edison ESD
 Kentfield ESD
 Mark Twain ESD
 Reed Union SD
 Emery USD
 Hermosa Beach City SD
 Larkspur ESD
 Calistoga Joint USD
 Coast USD
 Kings River Union ESD
 Montecito SD
 Burrel USD

El Dorado	4,500
San Diego	4,500
Fresno	4,416
Santa Clara	4,300
Orange	4,200
Los Angeles	4,200
Tulare	4,150
San Jose	4,135
Humboldt	3,884
Marin	3,850
Santa Barbara	3,800
Ventura	3,600
San Mateo	3,300
Los Angeles	3,300
Los Angeles	3,300
Santa Clara	3,200
King	3,201
Santa Clara	3,100
Ventura	3,100
San Benito	3,000
Tulare	3,000
Santa Clara	3,023
San Mateo	2,900
Los Angeles	2,900
Orange	2,860
Santa Clara	2,800
San Benito	2,700
Sonoma	2,700
San Diego	2,700
San Mateo	2,680
San Mateo	2,660
Merced	2,600
Contra Costa	2,379
Santa Clara	2,375
Sacramento	2,287
Monterey	2,200
Fresno	2,200
Marin	2,200
Santa Cruz	2,500
Lake	2,000
Mendocino	1,907
Madera	1,928
Yolo	1,800
Madera	1,900
Marin	1,800
Tuolumne	1,700
San Joaquin	1,570
Sonoma	1,500
San Diego	1,500
San Mateo	1,336
Santa Barbara	1,200
Kern	1,139
Marin	1,000
Calaveras	1,000
Marin	1,000
Alameda	975
Los Angeles	900
Marin	875
Napa	830
San Luis Obispo	810
Kings	476
Santa Barbara	410
Mendocino	102

Other:**Association of California School Administrators (ACSA)**

(Executive Director)	
Los Angeles COE (CBO)	Los Angeles
Los Angeles COE (Superintendent)	Los Angeles
Santa Clara COE (Superintendent)	Santa Clara
Santa Monica-Malibu (Interim Superintendent)	Los Angeles
Green Dot Public Schools (Chief Academic Officer)	Los Angeles
City Heights Educational (Exec. Director.)	San Diego
Tri-Cities ROP	Los Angeles
Baldy View ROP	San Bernardino
La Puente Valley ROP	Los Angeles
Mission Valley ROP	Alameda
East San Gabriel SELPA	Los Angeles
Montebello USD (HR Director)	Los Angeles
Montebello USD (M.S. & Elementary Principal)	Los Angeles
Anaheim City SD (Asst. Supt., HR)	Orange
Pasadena USD (Asst. Superintendent)	Los Angeles
Claremont USD (Special Ed Director)	Los Angeles
Reed Union ESD, (M.S Principal)	Marin
Ross ESD, (M.S. Principal)	Marin
Las Lomas ESD (MS & Elem. Principals)	San Mateo
West End SELPA (Exec. Director)	San Bernardino
CIF, San Diego Section (Commissioner)	San Diego
San Diego Jewish Academy	San Diego
San Bernardino City USD (Interim Superintendent)	San Bernardino



Comments From Board Members

The following are excerpted from letters of recommendation written by boards who selected Leadership Associates as their search consultants:

"Leadership Associates solicited and recruited applications throughout California and the nation. They then completed in-depth reference checks on all of the people who applied and presented us with an outstanding list of candidates to interview." Sacramento County Office of Education

"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." Encinitas Union School District

"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." Irvine USD

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

"Something we particularly appreciated about their selection process is that they engaged the board and our final candidate in a dialogue about the major elements of the employment agreement. The partners of Leadership Associates are experts in the art of governance." Claremont 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." Placentia-Yorba Linda USD

"Not only do (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." Palo Alto 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." Oceanside USD

"One of the first things they did was to help us find an Interim Superintendent... They began the process of finding a permanent superintendent by laying out several detailed timelines and allowing us to select one that best suited our needs." Sacramento City USD

"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." Santa Ynez Valley UHSD

"Not only are they consummate professional, 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 firing points for our new superintendent." Walnut Valley USD

"Before we engaged Leadership Associates, we conducted extensive due diligence with respect to other firms. Beginning with my first conversation on this subject with a School Board member in another district, who told me Leadership Associates was 'head and shoulders' above the other firms his district had interviewed, and continuing with discussions with other education leaders in California we had high expectations. (They) did not disappoint." San Marino USD

"You (Leadership Associates) listened to all stakeholders and certainly did bring to us an excellent pool of candidates.... we appreciate your confidentiality and professionalism." Corona Norco USD

"(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." Standard 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." Fullerton 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." Whittier City School District

"...our heartfelt appreciation for the professional manner you conducted our recent superintendent search. We are truly delighted with our choice, and know that your hard work certainly led us to our anticipated success." Santa Clara COE

"We appreciated their organizational skills, leadership, expertise, and sense of humor during this very intense process. Their commendable reputation and integrity were invaluable in leading us to making an important decision. They were careful to remain objective, yet gave us all the information we needed." Elk Grove USD

"(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. "Eureka City Schools

"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." Folsom-Cordova USD

Leadership Associates

2. GENERAL ADMINISTRATION

2.2 Discussion and Possible Authorization for Board Member Travel to the 2013 CTA Fall Leadership Conference in Las Vegas, Nevada on November 22-24, 2013

BACKGROUND INFORMATION: At the May 7, 2009 board meeting, protocol requiring the board to authorize all board member travel was established. The 2013-14 travel budget for the board was approved for \$18,700.

CURRENT CONSIDERATIONS: The annual 2013 CTA Fall Leadership Conference will be held in Las Vegas, Nevada on November 22-24, 2013. The Board would like to discuss this event to determine if anyone would like to attend and would be able to attend given the very short timeline.

The cost for one board member to attend would be approximately:

Conference Registration	\$ 200.00
Hotel costs: \$110.88 x 2 nights	\$ 221.76
Meals costs: \$50.00 daily x 2	\$ 100.00
Fuel for District Vehicle	\$ 100.00
 Total Estimated Expense	 \$ 621.76

FINANCIAL IMPLICATIONS: The travel budget for the board for 2013-14 is \$18,700. To date, however, approximately \$7,059 has previously been approved.

SUPERINTENDENT'S RECOMMENDATION: In accordance with the board's adopted protocol, it is recommended that the board review the proposed travel and determine if it wishes to authorize this travel activity.



- [Summary](#)
- [Hotel](#)
- [Trainings](#)

2013 High Desert Service Center Council Fall Leadership Conference

Friday, November 22, 2013 5:00 PM -

Sunday, November 24, 2013 12:15 PM (Pacific Time)

The New Tropicana Las Vegas

(800) 462-8767

3801 Las Vegas Blvd. S.

Las Vegas, NV 89109

 [Map and Directions](#)

CTA...to the Core!

The High Desert Service Center Council is privileged to again host its annual Fall Leadership Conference in Las Vegas, Nevada. The 2013 conference will be packed with new tools designed to assist you in representing your members by providing clear, current, and comprehensive information. We are also proud to present break-outs on thought-provoking issues impacting children, families, and our districts.

Service takes many forms. You may participate on a bargaining team, a political action committee, a rep council, an executive board, or as an advocate for children and colleagues. Regardless of your role, this conference is designed for leaders like you who are willing to keep our associations powerful and relevant.

Plan NOW to attend this informative and stimulating event!

TENTATIVE CONFERENCE SCHEDULE *(subject to change)*

FRIDAY	
5:00 pm – 9:30 pm	Registration/Information and Exhibits
6:00 pm – 10:00 pm	Buffet Dinner Reception and Dance
SATURDAY	
7:00 am – 5:00 pm	Registration/Information and Exhibits
7:30 am – 8:30 am	Breakfast Buffet
8:30 am – 10:00 am	Training Session 1
10:00 am – 10:15 am	Coffee and Tea Break
10:15 am – 11:45 am	Training Session 2
12:00 pm – 1:30 pm	Lunch

1:45 pm – 3:15 pm	Training Session 3
3:15 pm – 3:30 pm	Break
3:30 pm – 5:00 pm	Training Session 4
5:15 pm – 6:30 pm	EMAC Reception
SUNDAY	
7:30 am – 11:30 am	Registration/Information
7:30 am- 8:30 am	Coffee/Tea Service
8:30 am – 10:00 am	Training Session 5
10:00 am – 11:30 am	Brunch, Speaker—CTA President Dean Vogel, Closing Comments
11:30 am – 12:15 pm	Chapter Time

**NOTES:**

Early registration has ended. Registration fee is now \$200 for attendees and \$900 for business partners.

The hotel cut-off date has been extended to Friday, November 8, 2013.

2013 High Desert Service Center Council Fall Leadership Conference

Friday, November 22, 2013 5:00 PM - Sunday, November 24, 2013 12:15 PM (Pacific Time)

The New Tropicana Las Vegas

3801 Las Vegas Blvd. S.

Las Vegas, NV 89109

(800) 462-8767

[Event Details](#)

CTA Conference Coordination Center

Phone: 650-552-5355

Email: ccc@cta.org [Email Us](#)

[View or Change Your Existing Registration](#)

Start Your Registration

★ Email Address:

★ Verify Email Address:

- ★ Please select registration type:
- ☐ Conference Attendee: \$200.00 [Details](#)
 - ☐ CTA/NEA Board and/or Steering/Planning Committee
 - ☐ CTA Staff / Conference Presenter
 - ☐ Business Partner: \$900.00

You can also register a group. [Learn More](#)

Registration is complete once you click on the
"FINISH" button on the last page.
 You will receive a confirmation email shortly after completion.