

## Superintendent

### Search Services Proposal for

# Livermore Valley Joint Unified School District Livermore, California

March 2024



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March 19, 2024

Board of Education  
Livermore Valley Joint Unified School District  
685 East Jack London Blvd.  
Livermore, California 94551

Thank you for your request for information. The enclosed proposal describes the professional services McPherson & Jacobson, L.L.C. will provide Livermore Valley Joint Unified School District in ensuring your superintendent search secures quality leadership for the district.

As a nationally recognized leader in superintendent searches, McPherson & Jacobson will work with the board to design a search that meets the unique needs of your school district. Our firm's protocol allows the board to concentrate on the most important segments: the interview and selection of the successful candidate.

At the core of our firm's work is the belief that every student is entitled to high quality education and that this is dependent upon quality leadership. We understand that students have diverse needs, thus, we focus on the intentional recruitment of a diverse candidate pool that includes ethnic and cultural identity as well as experience in culturally proficient practices that have proven successful in addressing educational equity gaps.

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

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

Sincerely,

*Dr. Norm Ridder*

Owner, McPherson & Jacobson L.L.C.



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## Executive Summary

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

- Our process is comprehensive and provides critical support for the most time-consuming aspects of recruiting and screening the candidates, so the board can focus on interviewing and selection.
- Our team of consultants, working in conjunction with the board and diverse stakeholder groups you identify, will implement a systematic, comprehensive process culminating in the hiring of the most qualified candidate for your district.
- We take the entire board through a consensus decision-making process to identify the top criteria for the selection of the new superintendent.
- Transparency is a hallmark of our protocol. Stakeholder participation emphasizes the transparency of our process. We meet with groups to ensure broad-based stakeholder input in the selection process. In addition, we provide an online survey to reach out to anyone who cannot attend a stakeholder meeting. The consultants will present a comprehensive written report to the board, which includes all of the comments recorded during the input sessions.
- McPherson & Jacobson's consultants actively recruit candidates that meet the selection criteria. If desired, we will recruit non-traditional candidates.
- Applicant confidentiality is important to attract top candidates. Names remain confidential until the board selects their finalists.
- The consultants will read all of the completed files submitted by applicants and evaluate them against the selection criteria.
- The consultants will conduct reference checks until they have complete knowledge of the applicant's strengths and weaknesses. The consultants will pre-interview applicants to be submitted on the shortlist. In-depth background checks (criminal, financial, and educational degree verification) are conducted on the candidates selected by the board to be interviewed.
- We will continue to work with your school district until a superintendent is hired and in place.
- Phase V provides a continued commitment to work with your board and new superintendent for one year. We will help you collaboratively establish annual performance objectives for the new superintendent's first year. Evidence from previous searches shows this phase to be very positive as it fosters a good transition.
- We are so confident of our ability to identify the district's criteria, recruit, and screen applicants against those criteria, and assist during the transition period, that we guarantee our service.

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

## About McPherson & Jacobson

### The McPherson & Jacobson Difference

***“Your students, staff, and community deserve the best.”***

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

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

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

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

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

- **California School Boards Association Business Partner**

The **California School Boards Association** has selected McPherson & Jacobson, L.L.C. as an exclusive business partner for superintendent searches in California. McPherson & Jacobson is a leading national search firm that has California-based consultants.



- **Leading National Search Firm**

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 1,000 superintendents** and other officials in public and non-profit organizations across the United States. **McPherson & Jacobson is one of the leading national superintendent search firms.**

- **Nationwide Network of Experienced Consultants**

McPherson & Jacobson has **over 120 consultants** across the nation. Over one-fourth of McPherson & Jacobson consultants are minorities or female. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensure your search results in quality leadership for education excellence.

- **Sustainability in Leadership**

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

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

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

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

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

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

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

## Applicant Diversity

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

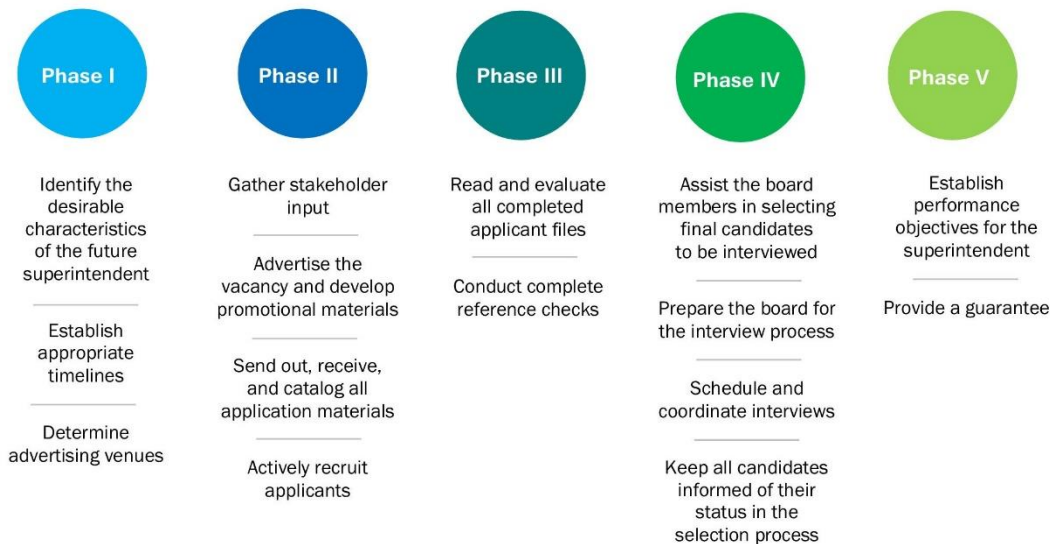
We use our nationwide consultant network to track the careers of successful administrators. We also work closely with universities, colleges, and professional organizations that represent and promote minority and female applicants.

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

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

# Search Process

## Five Phases of a Superintendent Search



### Phase I—Initiating the Search Process

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

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

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

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

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

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

- **Identify appropriate stakeholder groups.**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

- **Develop promotional literature and brochures announcing the vacancy (optional—there is an additional fee for a full-color brochure).**

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

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

McPherson & Jacobson's staff will prepare and place the announcement of vacancy. It will be sent to the state school board and administrator associations, as well as media venues selected by the board. Additionally, McPherson & Jacobson maintains an interactive website ([www.macnjake.com](http://www.macnjake.com)) that allows applicants to access all the application materials and apply online. The website averages over 225,000 hits per month.

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

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

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

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

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

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

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

- **Confidentiality of Applicants**

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

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

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

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

- **Communicate with all Board Members in a timely manner.**

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

## Phase III—Applicant Screening

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

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

- **Conduct reference checks.**

We understand that applicants do not submit references who will not speak highly of them. We begin with the references given and ask them a list of questions relevant to the selection criteria. After asking those questions, we ask each reference to give us the names of other people who can speak of the applicant's qualifications. We then call those individuals and ask them the same set of questions, including asking them to give us the names of other people who can speak of the applicant's qualifications. We go a minimum of three people removed from the primary references. What we are looking for is consistency of answers that will verify the applicant's strengths and weaknesses.

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

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

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

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

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

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

## Phase IV—Reviewing Candidates with the Board, Interviews

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

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

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

- **Conduct background checks.**

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

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

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

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

- **Coordinate interview and visitation procedures.**

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

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

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

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

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

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

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

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

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

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

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

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

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

Once a contract has been offered by the board and accepted, the consultants will call each of the other final candidates and thank them on behalf of the board for



interviewing for the position. *These candidates are not notified until an offer has been accepted.* If by chance you lose your top candidate, we want to keep viable candidates available.

## Phase V—Transition with Success

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

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

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

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

- **Provide a guarantee.**

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

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

## Timeline

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

Search sequence:

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

## Responsibilities of Livermore Valley Joint Unified School District and McPherson & Jacobson, L.L.C.

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

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

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

## Stakeholder Involvement

Obtaining stakeholder input is an integral part of McPherson & Jacobson's search process. Since 1991, McPherson & Jacobson has conducted over 1,000 superintendent searches for school districts ranging from 10 to over 300,000 students. For each search, we have coordinated stakeholder input sessions. Besides meeting with stakeholder groups designated by the board, an online input survey is also available for those who cannot attend the meetings. After the meetings have been completed, the board will receive a written report with the findings of the meetings and online input.

### **Initial stakeholder input sessions**

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

### **Meeting the candidates**

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

### **Process for Obtaining Staff Input**

The consultants will meet with central office administrators, building administrators, teachers, classified staff, and students, to solicit their input into the selection process. Each group is asked to identify the strengths of the school district and community, the

characteristics they would like to see the new superintendent possess, and the issues facing the new superintendent. The results of these meetings are summarized by the consultants and presented to the board.

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

### **Process for Obtaining Parent and Community Input**

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

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

### **Process for Including Ethnically Diverse Communities**

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

At the request of the district, online surveys for multiple languages can be developed and posted.

### ***K12 Insight***

McPherson & Jacobson will utilize *K12 Insight* to collect the online input and provide an analysis of the input received. The online input received, analysis, and input received from in-person meetings will be summarized into a report and presented to the board.

# Cost Proposal Livermore Valley Joint Unified School District

## Investment for the Search

**The fee for conducting the superintendent search is \$19,900 for Phases I-V.**

**Estimated Expenses                      \$4,350**

- **Advertising**
  - Four (4) weeks of print advertising in EdCal (40-word ad)
  - Sixty (60) days of advertising on EdJoin
  - *Expenses may increase if additional advertising or alternative advertising venues are chosen.*
  
- **Stakeholder Meetings**
  - Two (2) days of in-person stakeholder meetings
  - Online stakeholder input surveys
  - Final report delivered to the board by email and one hard copy per board member, if requested
  - *If the district requests additional stakeholder input days, there will be an additional fee (negotiated between the district and the consultants) and additional expenses.*
  - *Depending on the languages selected for the surveys, there may be an additional fee charged for translating the results of the survey.*
  
- **Candidate Reviews/Information**
  - Video interviews of candidates (five (5) video interviews are included in the not to exceed amount)
  - Criminal/financial/degree verification background check for candidates chosen by the board for interviews (four (4) background checks are included in the not to exceed amount)
  - Assist in scheduling an on-site visitation to the finalist's home district (at the district's request).
  
- **Consultant Travel**
  - Travel expenses for consultants for scheduled trips to the school district (initial meeting with the board, stakeholder meetings, meeting to discuss the stakeholder input, meeting to present candidates to the board).
  - *Consultant travel expenses can be reduced if the district requests online meetings.*
  
- **Office Expenses**

**The total not to exceed amount including expenses is \$24,250.**

*Interview expenses for the candidates are not included in this amount.*



## Additional Services Available

- **Creating a Brochure for the Vacancy**

If the board requests, McPherson & Jacobson will prepare a full-color two or four-page brochure to advertise the vacancy. The fees are \$250 for a two-page brochure and \$500 for a four-page brochure. The information for the brochure needs to be provided to the firm no later than three weeks prior to the closing date for applications.

- **Personality/Strengths Assessments Option**

If the board requests, personality strength tests can be completed for the candidates.

Birkman International Signature Reports can be obtained for the candidates the district chooses to interview. The estimated fee for this service is \$700 per candidate. The report received will

- Show the traits most expressed by a potential candidate.
- Provide insight into work styles and environmental preferences.
- Help you understand the projects and initiatives a candidate will likely prioritize.

- **Assistance in Hiring the Selected Candidate**

*The fee will be based on an hourly negotiated rate.*

- Assist the board in revising and updating the superintendent's job description.
- Assist the board in developing an effective contract.
- Provide assistance in negotiating the contract with the finalist.

- **Searches for Other Leadership Positions**

*The fee will be based upon services selected.*

McPherson & Jacobson can assist the district in filling additional leadership positions in your district (principals, central office, etc.). For these searches, we offer either a full search process, or we can assist the district with selected parts of the search. Our consultants would be pleased to discuss the options with you. For some districts we have a blanket contract to assist the district with their leadership openings as they occur.

## McPherson & Jacobson Guarantees

### Client Satisfaction

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

If the board chooses to use our complete service, we will guarantee our process for **two (2) years**. If the person selected leaves the position, for whatever reason, within the guarantee period, we will repeat the process at no charge except actual expenses. *The guarantee is valid only if the board is comprised of a majority of the members who hired the superintendent (exceptions would be considered in situations of a placement's personal or family reasons for leaving).*

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

### Price Match

McPherson & Jacobson, L.L.C. will match the search fee for a comparable level of services provided by the competitive bid.

### Recruiting the Selected Candidate

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

## Additional Information

### California Consultants

**Mrs. Nicole Anderson**, Educational Consultant, Vallejo

**Dr. Adam Clark**, Superintendent, Mt. Diablo USD, Concord

**Dr. Sonny Da Marto**, Retired Superintendent, Folsom

**Dr. Penelope DeLeon**, Superintendent, Newark Unified School District

**Dr. Reyes Gauna**, Superintendent, Byron Union School District

**Dr. Shelley Jones-Holt**, Educational Consultant, Sacramento

**Dr. Michele Huntoon**, Associate Supt. of Business, East Side Union High School District

**Mr. William Huyett**, Retired Superintendent, Lodi

**Mr. Benjamin “Ben” Johnson II**, Former Board Member, Riverside

**Dr. Steven Lowder**, Retired Superintendent, Stockton

**Dr. Michael McCoy**, Retired Superintendent, Bakersfield

**Dr. Daniel Moirao**, Retired Superintendent, Danville

**Mr. Daniel Moore**, Superintendent, Linden

**Ms. Suzanne Morey**, Retired Administrator, Laguna Woods

**Dr. Stanley Munro**, Administrator, Fresno USD, Clovis

**Mr. Dennis Murray**, Retired Superintendent, Cameron Park

**Dr. Julie Vitale**, Superintendent, Oceanside Unified School District

*Memberships/affiliations: AASA, ACSA, ERDI, CSBA*

**Mr. Daniel Zeisler**, Retired Superintendent, Grass Valley

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

**Albany Unified School District, Berkeley**

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

**Alisal Union School District, Salinas**

Search Year: 2015/16, Enrollment: 9,000

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

**Alpine Union School District, Alpine**

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

**Anderson Union High School District, Anderson**

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

**Association of California School Administrators (ACSA)—Sr. Director of Diversity,  
Equity and Inclusion, Sacramento**

Search Year: 2022/23

**Benicia Unified School District, Benicia**

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

**Berkeley Unified School District—Executive Director for Special Education,  
Berkeley**

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

**Calexico Unified School District, Calexico**

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

**Central Unified School District, Fresno**

Search Year: 2021/22, Enrollment: 15,000

**Central Union High School District, El Centro**

Search Year: 2021/22, Enrollment: 4,116

**Cold Spring School District, Santa Barbara**

Search Year: 2016/17, Enrollment: 175

**Conejo Valley Unified School District, Thousand Oaks**

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

**Davis Joint Unified School District, Davis**

Search Year: 2021/22, Enrollment: 8,300

**Davis Joint Unified School District—Associate Superintendent for Instructional  
Services, Davis**

Search Year: 2022/23, Enrollment: 8,300

**Del Norte Unified School District—Executive Director of Special Education,  
Crescent City**

Search Year: 2022/23, Enrollment: 3,600

**Denair Unified School District, Denair**

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

**El Monte Union High School District, El Monte**  
Search Year: 2014/15, Enrollment: 9,500

**Elk Grove Unified School District, Elk Grove**  
Search Year: 2014/15, Enrollment: 62,000

**Evergreen Elementary School District, Elk Grove**  
Search Year: 2021/22, Enrollment: 9,260

**Fallbrook Union High School District, Fallbrook**  
Search Year: 2013/14, Enrollment: 2,600  
Search Year: 2018/19, Enrollment: 2,200

**Folsom Cordova Unified School District, Rancho Cordova**  
Search Year: 2023/24, Enrollment: 21,000

**Fort Sage Unified School District, Herlong**  
Search Year: 2016/17, Enrollment: 180

**Glendale Unified School District, Glendale**  
Search Year: 2014/15, Enrollment: 26,200

**Golden Valley Unified School District, Madera**  
Search Year: 2017/18, Enrollment: 1,950

**Gonzales Unified School District, Madera**  
Search Year: 2021/22, Enrollment: 2,000

**Grass Valley School District, Grass Valley**  
Search Year: 2019/20, Enrollment: 1,500

**Gustine Unified School District, Gustine**  
Search Year: 2014/15, Enrollment: 1,830

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

**Hayward Unified School District, Hayward**  
Search Year: 2021/22, Enrollment: 19,000

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

**Howell Mountain Elementary School District, Angwin**  
Search Year: 2023/24, Enrollment: 100

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

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

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

**Mark Twain Union Elementary School District, Angels Camp**  
Search Year: 2022/23, Enrollment: 736

**Mount Shasta Union School District, Mt. Shasta**

Search Year: 2021/22, Enrollment: 534

**Nevada Joint Union High School District, Grass Valley**

Search Year: 2017/18, Enrollment: 2,600

**New Haven Unified School District, Union City**

Search Year: 2016/17, Enrollment: 12,148

Search Year: 2018/19, Enrollment: 12,000

**Newark Unified School District, Newark**

Search Year: 2019/20, Enrollment: 5,700

**Newcastle Elementary School District, Newcastle**

Search Year: 2014/15, Enrollment: 796

Search Year: 2022/23, Enrollment: 398

**Oakley Union Elementary School District, Oakely**

Search Year: 2020/21, Enrollment: 4,900

**Old Adobe Union School District, Petaluma**

Search Year: 2013/14, Enrollment: 1,700

Search Year: 2019/20, Enrollment: 1,950

**Oxnard Union High School District, Oxnard**

Search Year: 2015/16, Enrollment: 16,500

Search Year: 2019/20, Enrollment: 16,800

**Pacifica School District, Pacifica**

Search Year: 2022/23, Enrollment: 3,000

**Parlier Unified School District, Parlier**

Search Year: 2017/18, Enrollment: 3,435

Search Year: 2019/20, Enrollment: 3,500

**Paso Robles Joint Unified School District, Paso Robles**

Search Year: 2013/14, Enrollment: 6,500

**Penn Valley Union Elementary School District, Penn Valley**

Search Year: 2014/15, Enrollment: 700

**Piner-Olivet Union School District, Santa Rosa**

Search Year: 2019/20, Enrollment: 1,300

**Pollock Pines Elementary School District, Pollock Pines**

Search Year: 2015/16, Enrollment: 800

**Rancho Santa Fe School District, Rancho Santa Fe**

Search Year: 2022/23, Enrollment: 581

**Red Bluff Joint Union High School District, Red Bluff**

Search Year: 2013/14, Enrollment: 1,622

**Richland School District, Shafter**

Search Year: 2015/16, Enrollment: 3,504

**Riverbank Unified School District, Riverbank**

Search Year: 2022/23, Enrollment: 2,400

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

**San Bernadino City School District, San Bernadino**  
Search Year: 2022/23, Enrollment: 48,700

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

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

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

**Santa Barbara Unified School District—Chief Technology Officer, Santa Barbara**  
Search Year: 2021/22, Enrollment: 15,000

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

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

**Saugus Union School District, Santa Clarita**  
Search Year: 2017/18, Enrollment: 10,000

**Sausalito Marin City School District, Marin City**  
Search Year: 2015/16, Enrollment: 524  
Search Year: 2022/23, Enrollment: 415

**Sierra-Plumas Unified School District, Loyalton**  
Search Year: 2022/23, Enrollment: 400

**Sierra-Plumas Unified School District/Sierra County Office of Education, Loyalton**  
Search Year: 2018/19, Enrollment: 386

**Siskiyou Union High School District, Mt. Shasta**  
Search Year: 2023/24, Enrollment: 555

**Siskiyou Union High School District—High School Principal, Mt. Shasta**  
Search Year: 2022/23, Enrollment: 575

**Soledad Unified School District, Soledad**  
Search Year: 2016/17, Enrollment: 4,800  
Search Year: 2020/21, Enrollment: 5,000

**Sonoma Valley Unified School District, Sonoma**  
Search Year: 2020/21, Enrollment: 3,730

**Sonora Union High School District, Sonora**  
Search Year: 2019/20, Enrollment: 1,000

**South Bay Union School District, Eureka**  
Search Year: 2021/22, Enrollment: 500

**South Monterey County Joint Union High School District, King City**  
Search Year: 2022/23, Enrollment: 2,200

**Stockton Unified School District, Stockton**  
Search Year: 2022/23, Enrollment: 33,000

**Strathmore Union Elementary School District, Strathmore**  
Search Year: 2019/20, Enrollment: 773

**Travis Unified School District, Fairfield**  
Search Year: 2023/24, Enrollment: 5,400

**Tulare City School District, Tulare**  
Search Year: 2023/24, Enrollment: 9,300

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

**Vallejo City Unified School District, Vallejo**  
Search Year: 2020/21, Enrollment: 11,500

**Ventura Unified School District, Ventura**  
Search Year: 2016/17, Enrollment: 17,000

**Washington Unified School District, West Sacramento**  
Search Year: 2020/21, Enrollment: 7,460

**Whittier City School District, Whittier**  
Search Year: 2021/22, Enrollment: 6,300

**Winship-Robbins Elementary School District, Meridian**  
Search Year: 2013/14, Enrollment: 200

**Winters Joint Unifed School District, Winters**  
Search Year: 2021/22, Enrollment: 1,550



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



Matt Best  
Superintendent

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526 B Street ♦ Davis, CA 95616 ♦ (530) 757-5300 ♦ FAX: (530) 757-5323 ♦ [www.djUSD.net](http://www.djUSD.net)

To whom it may concern:

Davis Joint Unified School District had a successful search for the position of Superintendent in the Spring of 2022. Bob Ferguson and Bill Huyett of McPherson and Jacobson ensured that we had an open and public process by conducting extensive outreach to all communities. This report of community input was shared with the Board at a public meeting and helped the Davis community understand what it values in a Superintendent. At the same time, the Board was grateful for the recruitment of excellent candidates for the position. The interview process was not only informative but also personable as we got to know all the candidates. When it came to selecting a Superintendent, Bob and Bill assisted our decision with patience and sage advice. Although it started as an exercise in hiring, it turned into a reflective learning process.

Sincerely,

Thomas Adams, Ph.D.  
President, Davis Joint Unified School District

**From:** Neil Layton <[nlayton@scsdk8.org](mailto:nlayton@scsdk8.org)>  
**Date:** September 17, 2022 at 4:12:32 PM PDT  
**To:** William Huyett >  
**Subject:** Letter of Reference

Bill:

In Fall of 2021 McPherson and Jacobson helped lead our nationwide Superintendent search. Unlike other firms, McPherson and Jacobson encouraged a community involved search that engaged all stake holders. Through the leadership of Bill Huyett and Nicole Anderson, McPherson and Jacobson held over 20 community meetings and obtained over 150 community surveys to help guide the Board in the hiring process. Additionally, McPherson managed a 14 person community interview panel to help provide direct candidate feedback to the Board. As a result of this hard work, San Carlos was able to find a visionary educational leader who has been able to have success from her first day on the job. We would not have had the same success with another firm.

Neil Layton  
San Carlos School District  
San Carlos, CA



**Christi Barrett, Ph.D.**  
Superintendent

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

**Professional Development  
Service Center**

1791 W. Acacia Avenue  
Hemet, CA 92545  
(951) 765-5100  
Fax: (951) 765-5115

**Professional Development  
Academy**

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

**Governing Board**

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

[www.hemetusd.org](http://www.hemetusd.org)



[www.facebook.com/hemetunified](https://www.facebook.com/hemetunified)



[twitter.com/HemetUnified](https://twitter.com/HemetUnified)

August 13, 2020

To Whom It May Concern:

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

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

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

Sincerely,

Christi Barrett, Ph.D.  
Superintendent

## Comments from Santa Barbara Unified School District

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

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

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

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

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

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

Monday, September 19, 2022

Gregg Gunkel  
343 South Old Stage Rd  
Mt. Shasta, CA 96067  
831-239-3470

Re: Letter of Reference for McPherson and Jacobsen, LLC

To Whom It May Concern,

Selection of a new superintendent has always been a challenging endeavor, especially given the obstacles public education has experienced in the last few years. As we entered this process with two major leaders in the district leaving their posts, I found myself thrust back into the role of board president as our existing board president stepped down due to health issues. Fortunately, our departing superintendent wisely recommended McPherson and Jacobsen as a qualified agency for superintendent selection.

William Huyett presented the agency's credentials in a manner that gave my board encouragement and newfound confidence to take on the process. Mac and Jake (as they humorously refer to themselves) did an exhaustive May campaign to identify as many qualified candidates as possible at a time when the candidate pool was quickly being depleted. Mr. Huyett skillfully guided the board through the process of reviewing and narrowing down the candidates. Even then, time and offers from other districts narrowed our list even further, causing us to fear that we would not find candidates possessing the qualities we desired. candidates would have fewer and fewer qualifications. But Mr. Huyett took extra care to help us determine which of the available candidates best met our criteria and needs.

Mac and Jake proved to be so helpful in this process, mainly by providing us with a geographically broad and experiential skills detail that gave the board confidence in the selection process. The guidance we received in setting up the multipronged screening and interview process helped us to engage a good cross section of our stakeholders, which was essential to building confidence in the district's communities. The interview design, as guided by Mr. Huyett, was deeply probing and enlightening as to who the candidates really were and how well they fit our perceived needs. Mr. Huyett constantly made himself available, helping us through final selection, contract proposal definition, and the ultimate hiring of our new superintendent.

Though not for the faint of heart, selection of a new superintendent is easily the most important selection and hiring process a district must undergo. Our district has thrived under excellent leadership; we have also suffered a few poor superintendents in the past. The outstanding guidance provided by Mr. Huyett appears to have paid off for Siskiyou Union High School District. While we are still in the "honeymoon" phase with our new superintendent, he continues on a daily basis to provide us with confidence that we made the right selection.

For all these reasons, I can highly recommend MacPherson and Jacobsen LLC and Mr. William Huyett for the difficult and most-important task of finding and securing a new superintendent.



Gregg Gunkel, Board President Siskiyou Union High School District





# LINDEN

Unified School District

18527 E Main Street, Linden, CA 95236  
Phone: 209-887-3894 Fax: 209-887-2250 www.lindenUSD.com



January 30, 2023

TO: MacPherson & Jacobson

RE: Letter of Reference in the Hiring Process of the Superintendent of Linden Unified School District

To whom it may concern:

This is a letter of reference for Aida Buelna and William Huyett in regard to the hiring process of our current Superintendent, Daniel Moore who was hired as superintendent for the Linden Unified School District for the 2020/21 school year. As Board President at the time, I was quite impressed with the thoroughness of the entire process. The consultants gave us highly qualified candidates with ample time to review their qualifications before the interview process. We especially enjoyed the multiple facets of having the community panel and employee panel to help ensure we had key input from influential stakeholders.

To further the vetting process, it was very helpful to have the coffee chats with all the interview candidates with two board members present at each, which allowed us to get to know them all on a more personal level, before making our final decision to hire Mr. Moore. The interview day went very smoothly due to the professionalism and organizational skills of both Ms. Beulna and Mr. Huyett. When making our final decision, it was with the expertise of Bill and Aida that helped us in making an informed decision that was best for the district.

The Board thoroughly enjoyed the entire process and appreciated all the time and effort put into it. In the future, when we are looking to hire a superintendent again (hopefully not in the near future), we would have no reservation in utilizing Aida and Bill from your organization. If you have any questions or would like more information regarding these two recruiters, please do not hesitate to email me at LUSDArea5@lindenUSD.com.

Sincerely,

*Eric Nims*

Eric Nims

Linden Unified School District

Board Vice President

ADMINISTRATION

Daniel Moore  
Superintendent

Dr. Jamie Hughes  
Assistant Superintendent

Stephen Corl  
Chief Business Official

GOVERNING BOARD

Marla Livengood  
President

Eric Nims  
Vice President

Marlene Von Berg  
Clerk

Jennifer Trotter  
Board Member

Rebecca Hall  
Board Member



January 29, 2023

To whom it may concern,

It is my pleasure to write this letter of recommendation on behalf of the Board of Trustees of the San Mateo-Foster City School District. During the 2020-2021 school year, our district sought out Superintendent Search Firms to fill a vacancy for the following school year and we unanimously selected McPherson & Jacobson to fulfill that responsibility. We were assigned the services of co-lead consultants Aida Buelna and Nicole Anderson.

The Board of Trustees entered the process with very high expectations because our outgoing Superintendent Dr. Joan Rosas had served with distinction. Upon engaging with Aida and Nicole, we were struck by their accessibility and strong communication skills. They treated our Board of Trustees as partners in the process and we felt heard by them.

The same can be said of the way that McPherson & Jacobson engineered the community involvement process. They administered a thorough community input process that involved surveys and stakeholder interviews. Their analysis of our community input truly encapsulated the needs, strengths, and desires of our community.

In terms of candidate engagement, they used technology to pre-record video messages from prospective candidates that were later shared with the Board of Trustees. They also completed a thorough vetting of candidates and ensured that we knew everything we needed to know before interviews began.

The interview process was unique and co-created with our consultants. Aida and Nicole facilitated the process of identifying top candidates that we invited in for an interview. They subsequently arranged to have each candidate interview 1:1 with each Board member for an hour, interview for a community panel of 25 for an hour, and attend a later afternoon interview with the entire Board for an additional hour.

Ultimately, our Board hired a new superintendent, Diego Ochoa, who we feel has served our district very well in his two years with the district. McPherson & Jacobson certainly delivered on their promise to work with our Board to create a community-driven process to select our new Superintendent.

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**Board of Trustees**  
 LaTisa Brooks     Alison Proctor  
 Kenneth Chin     Shara Watkins

**Superintendent**  
 Diego R. Ochoa



SAN MATEO-FOSTER CITY  
SCHOOL DISTRICT



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Sincerely,

Alison Proctor  
2021 Board Vice President, 2022 Board President, & 2023 Board Member

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**Board of Trustees**

LaTisa Brooks    Alison Proctor  
Kenneth Chin    Shara Watkins

**Superintendent**

Diego R. Ochoa