

# Board Special Meeting

## Executive Committee of the Whole

November 8, 2017 4:15 pm – 5:30 pm

Board Office Conference Room, John Stanford Center

2445 3<sup>rd</sup> Avenue South, Seattle, WA 98134



### Agenda

#### Call to Order

4:15 pm

1. Roll Call
2. Approval of agenda

#### I. Board Action Items

1. Approval of a contract for an executive search firm to conduct a superintendent search

#### Adjourn

5:30 pm

*(Please note that this is a working committee. Documents may change before the meeting and/or prior to introduction before the Board. Special meetings of the Board may contain discussion and/or action related to the items listed on the agenda.)*



# **SCHOOL BOARD ACTION REPORT**

**DATE:** October 25, 2017  
**FROM:** Executive Committee of the School Board

**For Introduction:** November 15, 2017  
**For Action:** November 15, 2017

## **1. TITLE**

Approval of a contract for an executive search firm to conduct a superintendent search

## **2. PURPOSE**

As the governing body with the responsibility of employing a Superintendent, it is the responsibility of the Board to direct how a superintendent search will be conducted. This motion would approve a contract with a superintendent search firm.

## **3. RECOMMENDED MOTION**

I move that the School Board authorize the Board President to execute a contract on the District's behalf with (\_\_\_\_\_) in the amount of \$(\_\_\_\_\_) for the purpose of conducting a superintendent search, in the form of the draft Agreement dated \_\_\_\_\_ and presented to the School Board, with any minor additions, deletions, and modifications deemed necessary by the Board President, and to take any necessary actions to implement the contract. Immediate action is in the best interest of the district.

## **4. BACKGROUND INFORMATION**

### **a. Background:**

A Request For Proposals (RFP) seeking search firm proposals was issued on Oct. 13, 2017. A copy of the RFP is attached. The district received \_\_\_\_ proposals. On Nov. 1, 2017, an Executive Committee of the Whole meeting was held for Directors to review and discuss the proposals. Based on feedback and Directors evaluation of the proposals, this contract is being brought before the Board for consideration of approval.

This motion would approve the district entering into a contract with \_\_\_\_\_ Firm for the purpose of conducting a superintendent search. The process to conduct a superintendent search commonly takes 6 months or more. The major next steps of conducting a search after selection of a search firm, include, but are not limited to, establishing selection criteria, advertising in appropriate locations, setting a deadline for receiving applications, reviewing applications, identifying semi-finalist and finalists (through interviews and other means), and conducting community engagement.

### **b. Alternatives:**

- The Board does not approve this motion. This is not recommended because of the need to act in a timely manner in order to hire a superintendent by May 2018. By taking this step, the firm can begin the process.
- The Board can direct the Executive Committee to conduct a search, but to do so without retaining a search firm. In reviewing the list of superintendent openings on the Washington Association of School Administrators' (WASA) website (many of which were filled this past school year), a large majority were being conducted using a firm. This alternative is further not recommended because search firms have contacts and resources not available to the District (even assuming the District does outreach of its own to stakeholders and through regional schools organizations). The firm also provides valuable assistance in reviewing and checking applications and backgrounds. This work would need to be done by Human Resources if a firm is not selected, which already has a full program of activities.

- c. **Research:** The district conducted a formal RFP for search firms and received \_\_\_\_ number of proposals. An Executive Committee of the Whole met to review the proposals.

## 5. **FISCAL IMPACT/REVENUE SOURCE**

Fiscal impact of this action is \_\_\_\_\_. The district conducted a formal RFP for a search firm and pricing was a factor in the selection of a firm.

The revenue source for this motion is general funds.

Expenditure: ☒ One-time ☐ Annual ☐ Multi-Year ☐ N/A

Revenue: ☐ One-time ☐ Annual ☐ Multi-Year ☐ N/A

## 6. **COMMUNITY ENGAGEMENT**

As this process step is a Board responsibility, not applicable is checked. However, the search process would include community engagement.

☒ Not applicable

☐ Tier 1: Inform

☐ Tier 2: Consult/Involve

☐ Tier 3: Collaborate

## 7. **EQUITY ANALYSIS**

Not applicable.

## 8. **STUDENT BENEFIT**

Per Policy No. 1640, Responsibilities & Authority of the Superintendent, “In order to carry out its responsibilities, the Board employs a Superintendent of Schools as its Chief Executive Officer and as the Chief Administrative Officer of the district and shall delegate to the Superintendent such powers as are required to manage the Seattle Public Schools in a way consistent with Board direction and policy and state and federal law. The execution of all decisions made by the Board concerning the internal operation of the school system is delegated to the Superintendent. The Superintendent is accountable to the Board.” With such authority, a superintendent has the ability to impact student benefit for all SPS students.

**9. WHY BOARD ACTION IS NECESSARY**

- ☐ Amount of contract initial value or contract amendment exceeds \$250,000 (Policy No. 6220)
- ☐ Amount of grant exceeds \$250,000 in a single fiscal year (Policy No. 6114)
- ☐ Adopting, amending, or repealing a Board policy
- ☐ Formally accepting the completion of a public works project and closing out the contract
- ☐ Legal requirement for the School Board to take action on this matter
- ☒ Board Policy No. 1005, Responsibilities & Authority of the Board, states it is the responsibility of the Board to employ a superintendent who is charged with the day-to-day operations of the district.
- ☐ Other: \_\_\_\_\_

**10. POLICY IMPLICATION**

Per Policy No. 1005, Responsibilities & Authority of the Board, the Board’s role includes employing a superintendent who is charged with the day-to-day operations of the district.

**11. BOARD COMMITTEE RECOMMENDATION**

An Executive Committee of the Whole was held on November 1, 2017. At that meeting, the committee of the whole recommended this item \_\_\_\_\_.

**12. TIMELINE FOR IMPLEMENTATION**

Upon approval of this motion, a contract will be entered into with \_\_\_\_\_ Firm to conduct a superintendent search. The firm will report to the Executive Committee.

**13. ATTACHMENTS**

- Contract with \_\_\_\_\_ Firm (for approval)
- RFP for Consulting Services for a Superintendent Search (for reference)

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Seattle Public Schools  
Contracting Services  
2445 Third Avenue South  
Seattle, WA 98134  
Telephone: (206) 252-0566  
Fax: (206) 743-3018  
[contractingservices@seattleschools.org](mailto:contractingservices@seattleschools.org)

**Request for Proposal No. RFP10712**

**Consulting Services  
for  
Superintendent Search**

**Submittal Deadline:**

**Date: October 30, 2017**

**Time: 2:00 p.m.**

**Instructions**

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**REQUEST FOR PROPOSAL NO. RFP10712****PROPOSAL CERTIFICATION FORM**

TO: Diane T. Navarro, Contracting Services Manager

The undersigned provider hereby certifies as follows:

1. That he/she has read the Seattle School District's Request for Proposal No. RFP10712 and the following Addenda and to the best of his/her knowledge has complied with the mandatory requirements stated herein:

Addenda Number

Issue Date

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. That he/she has had the opportunity to ask questions regarding the Request for Proposal, and that if such questions have been asked; they have been answered by the District.
3. That the proposer's response is valid for 90 days.

Dated at \_\_\_\_\_, this \_\_\_\_\_ of \_\_\_\_\_ 2017.

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Title)

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Email Address)

\_\_\_\_\_  
(Company Name)

\_\_\_\_\_  
(Telephone Number)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(Fax Number)

\_\_\_\_\_  
(City)

\_\_\_\_\_  
(UBI Number)

\_\_\_\_\_  
(State)

\_\_\_\_\_  
(Zip)

## 1.0 INTRODUCTION

Seattle Public Schools (the District) is seeking consulting services from an experienced Executive Search firm to assist the District in identifying candidates for the position of Superintendent of Schools.

The Superintendent is responsible for the administration and management of a large and complex public educational system serving over 53,000 students at 104 schools and with a combined capital and operating budget exceeding one billion dollars. The seven member citywide elected Board expects the new Superintendent to continue the District's progress on the Strategic Plan, "Every Student. Every Classroom. Every Day." and help create the next Strategic Plan early in his or her tenure. The successful applicant for Superintendent will address several challenges, including chronic state underfunding, establishing a productive relationship with a new Mayor elected in November 2017, and managing system capacity in one of the fastest growing cities in the U.S.

The School Board desires to have a Superintendent selected no later than May 2018.

The term of the contract is expected to be from November 2017 to June 2018. This RFP is being issued in anticipation of approval by the School Board to hire a search firm in the first two weeks of November.

This Request for Proposal (RFP) describes the selection process and documentation required for submitting a Proposal. Any firm failing to submit their proposal in accordance with the procedures set forth in the Request for Proposal may be considered nonresponsive.

**It is the intent of the District to award the project listed above to one firm.**

The selection of the consultant for these services will proceed in the following manner:

- **Seattle Public Schools shall receive proposals no later than the due date and time specified in Section 2.0 of this RFP.**
- An initial screening will follow, resulting in a short-list of one or more qualified firms that will be selected for interviews (if deemed necessary).
- The District may conduct interviews (if deemed necessary) with the selected firms, in accordance with a schedule to be determined by the Selection Committee in order to select the best proposals, all factors considered.
- The District reserves the right to seek clarifications about the proposals.
- The District may award a contract based solely on the written proposals. However, the District may elect to engage in negotiations with a selected short list of vendors in order to improve the proposals and obtain the best contract(s) for the District.
- The District reserves the right to request post-proposal modifications, including best and final offers and considerations.
- The final selection will be based upon the criteria set forth in Section 6.1. The District reserves the right to negotiate with the successful firm on pricing, scheduling, or other factors.

## 2.0 SCHEDULE

### 2.1 Schedule of Activities



<b>SCHEDULE</b>	
<b>Date</b>	<b>Selection Process</b>
October 13, 2017	Advertisement for Request for Proposal Published. (First Notice)
October 20, 2017	Advertisement for Request for Proposal Published. (Second Notice)
October 23, 2017	Last day for Questions from Proposers by 2:00 p.m.
<b>October 30, 2017</b>	<b>Proposal Due by 2:00 p.m.</b>
Oct. 31-Nov. 3, 2017	Initial screening.
Approx. Nov. 3, 2017	Tentative Notification Sent to Selected Firm.
Approx. Nov. 3-10, 2017	Negotiation of Contract.
Approx. Nov. 15, 2017	Anticipated Board Approval and Approximate Start Date

### 3.0 QUESTIONS AND COMMUNICATION

All communication and/or questions shall be submitted in writing at the dates and times indicated herein to:

**U.S. Mail:** Diane Navarro  
Contracting Services  
Seattle Public Schools  
M/S 22-337  
P.O. Box 34165  
Seattle, WA 98124-1165

**Physical Location:** Diane Navarro  
Contracting Services  
Seattle Public Schools  
M/S 22-337  
2445 Third Avenue S.  
Seattle, WA 98134-1923

Phone: (206) 252-0566  
Fax: (206) 743-3018  
E-mail: [contractingservices@seattleschools.org](mailto:contractingservices@seattleschools.org)

All questions must be submitted electronically by e-mail or fax to Contracting Services by the date and time indicated in Section 2.0. Reference the RFP number in the subject of your email. The District will consider no telephone or in-person inquiries, except at the interviews for those firms making the short-list.

Answers to questions will be issued in the form of an addendum which will be provided electronically on the Builders Exchange website at [Builders Exchange of Washington](#) and on the Seattle Schools [Current Solicitations](#) website.

Proposals must be submitted electronically to Contracting Services at the above referenced email with the Request for Proposal number and the Project Title included in the subject heading of the email.

**In the event that a firm attempts to contact any official, employee, or representative of Seattle Public Schools in any manner contrary to the above requirements, said firm may be disqualified for further consideration.**

This prohibition does not apply to:

- Telephone calls to the District to request copies of this RFP, to confirm attendance, or request directions relative to an interview notification received from the District;
- Delivery of written questions about the proposal;
- Discussion at the interview (if deemed necessary);
- Delivery of the firm's proposal.

#### **4.0 BACKGROUND**

Seattle Public Schools (the District) is seeking consulting services from an experienced Executive Search firm to assist the District in identifying candidates for the position of Superintendent of Schools.

The School Board will develop and approve a selection process in consultation with the selected firm, including desired minimum qualifications and characteristics for the Superintendent's position.

The selected firm will report to the School Board's Executive Committee. The contact persons for the consultant will be the School Board President and General Counsel.

#### **5.0 PROJECT INFORMATION**

The Consultant shall undertake, at a minimum, the following responsibilities, and any additional responsibilities reasonably necessary to complete this work. The scope of work may include some or all of the following tasks:

- At the direction of the Executive Committee of the Board, conduct interviews with Board members, community leaders, and other members of the public and solicit input from these people to establish minimum qualifications and desired characteristics of the Superintendent;
- Based on direction from the Executive Committee of the Board, assist with the development of recommendations for position requirements, applicant qualifications, selection criteria, and the selection process;
- Advise the Board on salary/benefit package to offer;
- Advertise locally and regionally as directed;
- Targeted recruiting for applicants who can function effectively in the District's and area's culture and environment;
- Ensure that competitive applicants from diverse backgrounds apply;
- Assist in evaluation of candidates against the qualifications and desired characteristics approved by the Board to select a non-prioritized group of superior candidates for the Board to review. Information provided to the Board should include profiles of experiences, skills assessment, and professional and personal reference and background checks, including but not limited to review of references contacted and researched provided by applicants;
- Organize travel arrangements and itinerary for finalists as needed;
- Assist Board office staff in arrangements for interviews of finalist candidates; and
- Debrief and evaluate process with Board.

The District reserves the right to delete from the scope of work any or all of the scope from any of the projects listed. The District also reserves the right to modify the schedule, specific size, or scope.

## 6.0 SELECTION PROCESS

### 6.1 Method of Selection

1. The District will review all proposals and select one firm based upon the best interests of the District, all factors considered. The District reserves the right to conduct interviews with the top three firms, if deemed necessary.
2. The District intends to select a firm based upon the best interests of the District, all factors considered. Among the factors to be considered are the following:

EVALUATION CRITERIA	POINTS
Qualifications & Experience – 80%	
Firm's experience with comparable school districts, capabilities, and availability and capacity	20
Qualifications of team members	20
Approach	15
Awareness and understanding of Seattle Public Schools strengths and challenges and Seattle's political environment	15
References	10
Pricing – 20%	
Price of Services	20

Based on the recommendation of the Committee, the District will enter into contract negotiations with a selected firm. Upon receipt of best and final proposals, the Committee will select the best proposal, all factors considered.

**Please note that the District will select the successful firm/s based on the best interests of the District, all factors considered. The District reserves the right to reject any or all proposals, waive minor irregularities and informalities, and make the awards in its best interest.**

The District also reserves the right to take past performance on contracts of similar nature into account in selecting the firm.

The District reserves the right to terminate this contract at any time for any reason.

## 6.2 Notifications

The District will provide timely notifications to firms responding to the Request for Proposal upon selection of the recommended firm.

## 6.3 Seattle Schools Right to Reject

The District reserves the right to reject any and all proposals and re-advertise the RFP at any time prior to approval of the recommended firm and the negotiated agreement. All costs incurred in the preparation of the Request for Proposal process shall be borne by the proposing firm. **Proposals submitted in response to this Request for Proposal shall become the property of the District and be considered public documents under applicable Washington State laws.**

The District reserves the right to modify the scope of services as a result of the written submittals and/or interviews.

## 6.4 Procedures Requirements

Any firm failing to submit information in accordance with the procedures set forth herein may be considered non-responsive.

# 7.0 **SUBMITTAL REQUIREMENTS**

## 7.1 General Submittal Requirements

The submittal requirements shall be as follows:

**SUBMITTAL METHOD:** The proposing firm, joint venture or other form of association (“firm”) shall submit one ELECTRONIC copy of their proposal for the project sent via e-mail to [contractingservices@seattleschools.org](mailto:contractingservices@seattleschools.org). The Subject Line of the e-mail shall note the RFP number and Project Title.

**Each proposal is to be a maximum of fifteen (15) pages (8-1/2”x11”) single sided, not smaller than 12 point type.**

1. The cover letter, Proposal Certification Form, table of contents, and tabs, and resumes do not count toward the page limits.
2. Project cut sheets, including photos, are included in the page limits. Submittals exceeding the page limits may be considered non-responsive.
3. **Please Note:** In preparing the firm’s submittal, the proposing firm shall clearly identify the designated person of record responsible for any referenced project. If the proposing firm is representing an individual’s experience while employed at another firm, the firm of record for the project and the individual’s role shall be clearly identified.

## 7.2 Contents of the Proposal

1. Signed Proposal Certification Form (page 3 of the RFP). This does not count towards the page limit.

2. Table of contents (maximum 1 page).
3. Separate section with a tab: Executive Summary (maximum one page).
  - a. Provide a summary highlighting the firm's qualifications and special expertise to provide the services requested in the Request for Proposal.
4. Separate section with a tab: Company Profile and Qualifications of Team Members.
  - a. Identification of firm (or firms, if a joint venture or association) including address, telephone number, email address and date firm(s) were established.
  - b. Areas of specialization of the firm.
  - c. Provide total size and breakdown of firm personnel by category (e.g., principals, project managers, schedulers, clerical and other support staff). A firm organizational chart would be useful.
  - d. Briefly discuss how you propose to organize your team to accomplish the work. Please identify the primary team members who would lead this project and their qualifications. Identify each of the key players and define their roles and responsibilities. Describe each of the individual key team members' relevant professional experience, certification and education in resume form. Identify projects, date, position and firm with which individual was employed at the time services were performed.
5. Separate section with a tab: Awareness and Understanding of Seattle and Seattle Public Schools.
  - a. Please include your firm's and team's experience working in the Pacific Northwest, and describe your familiarity with the unique characteristics, culture, and opportunities of Seattle and the District.
6. Separate section with a tab: Project Approach.
  - a. Describe how you would approach this project, with a timetable and description of major activities. Include examples of different approaches and amounts/levels of community engagement you have used in other searches and your recommendation for our search. Please also explain how you handle/conduct background checks.
7. Separate section with a tab: Experience, Capabilities, and Availability & Capacity.
  - a. Include your firm's experience working for comparable urban districts (and specifically districts of comparable size), your firm's capabilities, and your availability and capacity to complete this project.
8. Separate section with a tab: References.
  - a. Provide the client name, address, email address, and client's project representative and telephone number for the firm's three most recent projects that most closely relate to the firm's qualifications for this project. If a joint venture or other form of association, provide reference information for each member firm.

9. Separate section with a tab: Pricing.
- a. Briefly discuss proposed pricing structure for the listed services, listing categories of individuals, present hourly rates, type of reimbursable costs, etc. The submittal must include information for hourly pricing.
  - b. The District anticipates awarding a contract on a time and materials basis, by hourly rates, to a fixed contract amount.
  - c. Please also include costs for reimbursable and direct expenses, such as supplies, postage, couriers, etc. Please include information about any planned use of technology and/or cost-saving measures (e.g. teleconferencing).
    - i. The District reimburses at the per diem rate as established by the U.S. General Services Administration (GSA) for Seattle, WA. For additional information on per diem rates, visit GSA's website at <http://www.gsa.gov/portal/category/104711>.
  - d. Please note that pricing should be based upon previous experience on projects completed and the services outlined in the RFP.

## 8.0 CONTRACT AND CONTRACTING PROVISIONS

### 8.1 Standard Form of Contract

The District's Contract for Consulting Services is included as Attachment 1. The proposal should include any comments or requested changes. **Please note: The District reserves the right to reject any firm that is not willing to accept the District's terms and conditions as noted in the standard form of contract.**

### 8.2 Additional Contract Document Requirements

The selected firm shall be required to provide the following documents to the District prior to execution of the contract:

- W-9 Form
- Washington State Business License
- Certificate of Insurance, including endorsement pages, with the following limits:

workers' compensation	statutory
employer's liability (stop gap)	\$1,000,000 each accident \$1,000,000 disease-policy limit \$1,000,000 each employee
commercial general liability	(per occurrence/aggregate)
bodily injury and property damage	\$1,000,000/\$2,000,000
personal and advertising injury	\$1,000,000/\$2,000,000
products and completed operations	\$1,000,000/\$2,000,000
fire legal liability	\$100,000
automobile liability (owned, non-owned, leased or hired)	\$1,000,000 per occurrence
umbrella/excess coverage	\$2,000,000 per occurrence
professional liability	\$1,000,000 each occurrence

### 8.3 Protest Procedures

1. Any actual or prospective Vendor who is aggrieved in connection with the solicitation or award of this contract may protest to the District in accordance with the procedures set forth herein. Protests based on the terms in this Request for Proposal, which are apparent prior to the date established for submitting the proposal must be received seven (7) days prior to the submittal deadline. Protests based on other events must be received within three (3) working days after the aggrieved person knows, or should have known, of the facts and circumstances upon which the protest is based; provided, however, that in no event shall a protest be considered if all proposals are rejected or if the protest is received after the award for this contract.
2. In order to be considered, a protest shall be in writing and shall include: the name and address of the aggrieved person; the contract title under which the protest is submitted; a detailed description of the specific grounds for protest and any supporting documentation; and the specific ruling or relief requested. The written protest shall be mailed to:

JoLynn Berge  
Assistant Superintendent for Business and Finance  
Seattle School District No.1  
MS 33-300  
P.O. Box 34165  
Seattle, WA 98124

Or delivered to:

JoLynn Berge  
Assistant Superintendent for Business and Finance  
Seattle School District No.1  
MS 33-300  
2445 3<sup>rd</sup> Avenue South  
Seattle, WA 98134

And shall be labeled: "Protest"

3. Upon receipt of a written protest, the District shall promptly consider the protest. The District may give notice of the protest and its basis to other persons, including Proposers involved in or affected by the protest; such other persons may be given an opportunity to submit their views and relevant information. If the protest is not resolved by mutual agreement of the aggrieved person and the District, the District will promptly issue a decision in writing stating the reasons for the action taken. A copy of the decision shall be mailed by certified mail, return receipt requested, or otherwise promptly furnished to the aggrieved person and any other interested parties. The District decision may be appealed to the Superintendent by written notice together with all supportive evidence, received at the address set forth in paragraph 2, not more than two (2) working days after receipt of the decision. The Superintendent's decision shall be final and conclusive.

4. Strict compliance with the protest procedures set forth herein is essential in furtherance of the public interest. Any aggrieved party that fails to comply strictly with these protest procedures is deemed, by such failure, to have waived and relinquished forever any right or claim with respect to alleged irregularities in connection with the solicitation or award. No person or party may pursue any action in court challenging the solicitation or award of this contract without first exhausting the administrative procedures specified herein and receiving the District's final decision.
5. Any Proposer submitting a proposal shall be deemed to have accepted these procedures.

### **End of Request for Proposal**

Attachment 1:

Sample Contract for Consulting Services

Attachments are available to view at [Builders Exchange of Washington](#)



October 24, 2017

To: Selection Committee Member (applicable to Voting and Non-Voting Members)

From: Contracting Services

RE: Proposal Evaluation Procedures

RFP: RFP10712: Consulting Services for Superintendent Search

Attached is your score sheet to complete for preliminary evaluation. I recommend first reviewing the RFP to understand the requested scope of work and the evaluation criteria in which you will be scoring the proposals. Once you receive the proposals I recommend you review them on your own, then meet with the Committee as a whole shortly after to discuss strengths/weaknesses of each proposal and finalize your preliminary scores (Qualifications criteria only, do not score pricing at this time). Once the preliminary evaluation has been completed by the Selection Committee, our next step would be to determine if follow up clarifications about the proposals are needed, interviews, etc. Please do not contact any proposing vendors during this time. Contracting Services will reach out to the vendor(s) on the Committee's behalf. Should you have any questions during the process, please call or email at 2-0566 or [namilgate@seattleschools.org](mailto:namilgate@seattleschools.org).

**AS A SELECTION COMMITTEE MEMBER, YOU UNDERSTAND AND AGREE TO THE FOLLOWING:**

Conflict of Interest. Per Board Policy No. 5251, all District officers and employees must disqualify themselves from participating in District actions in which they have a conflict of interest of a financial, relational, or other nature with any of the proposing vendors or key personnel of the vendors, such that no perception of appearance of such a conflict of interest could arise. The member will disclose to Contracting Services immediately when it could appear that they have a conflict of interest with any of the proposing vendors.

Comments about the proposals should be fair, objective, and based on the criteria in the RFP. In addition to the score sheet, sufficient documentation should be provided back to Contracting Services to show why the successful proposers were the best fit for the contract, as well as why the unsuccessful proposers were not the best fit.

During the review process, Selection Committee cannot make contact with the proposing vendors. Should the team need additional info or clarification on items, the Project Manager will contact Contracting Services and Contracting will reach out to the firm(s) on the team's behalf.

The scoring criteria in the RFP cannot be changed after the fact (i.e., after the due date of the RFP). If a decision is made to add, change, or delete any criteria, the process will need to start over.

The points allocated by the review team will be compiled to establish preliminary points. Scoring for preliminary points is the first step, and does not necessarily dictate the final result. Finalists are identified from the preliminary points, but those points may change as the finalists interview, provide clarifications,

as the District conducts reference checks, or for other reasons. Once all the scores are finalized, the Project Manager will deliver a hard copy to Contracting Services for review.

IMPORTANT: These are public documents. Anything stated on a score sheet is discoverable by the public records request process, and anything sent on email is discoverable as well. Unsuccessful firms sometimes request debriefs about the RFP process, copies of the score sheets, and copies of all of the correspondence (including email) pertaining to the RFP via the public records request process.

An unsuccessful vendor may decide to formally protest the District's decision. The RFP includes protest procedures, which will be followed in the event a vendor disputes the process and/or decision. Should that occur, Contracting Services staff will handle the protest in conjunction with the Department Owner and Legal Counsel.

Feel free to contact me should you have any questions.

**Nancy Milgate**  
Contracting Services



# Superintendent Search RFP

## RFP Responses

Seattle Public Schools is committed to making its online information accessible and usable to all people, regardless of ability or technology. Meeting web accessibility guidelines and standards is an ongoing process that we are consistently working to improve.

While Seattle Public Schools endeavors to only post documents optimized for accessibility, due to the nature and complexity of some documents, an accessible version of the document may not be available. In these limited circumstances, the District will provide equally effective alternate access.

For questions and more information about this document, please contact the following:

School Board Office  
206-252-0040  
[boardoffice@seattleschools.org](mailto:boardoffice@seattleschools.org)

The following documents are the responses provided by vendors interested in assisting the District in its next superintendent search.

**CLEAR-Consulting.Biz**

# REVISED Proposal for Superintendent for Seattle Public Schools Search

RFP10712



SEATTLE  
PUBLIC  
SCHOOLS



*The power for authentic leadership is  
found in the human heart -  
Vaclav Havel*

***Diversity is CLEAR™***

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## **SUPERINTENDENT SEARCH PROPOSAL**

**November 6, 2017**

**Ms. Diane Navarro, Contracting Services at Seattle Public Schools**

Greetings Ms. Navarro,

Thank you for the opportunity to submit this REVISED proposal for recruitment services in the search for your next Superintendent of Schools. Below is CLEAR's background, search process and search fees.

### **CLEAR-Consulting.Biz BACKGROUND**

CLEAR-Consulting.Biz is a Seattle-based executive search firm specializing in delivering diverse talent solutions for organizations throughout the Northwest and beyond with special focus on Gender and Racial Equity. The firm is led by founder Norman Sigler and focuses on searches for senior-level leaders and finance & accounting professionals. Below is a sample of Norman's history in Search:

<b>Social Profits (worked with Boards)</b>	<b>For Profits (worked with Hiring Managers)</b>	<b>Governmental (worked with Community Boards)</b>
<b>Seattle Opera</b> <i>CFO-COO</i>	<b>HomeStreet Bank</b> , <i>Chief Information Officer (while at Waldron &amp; Co.)</i>	<b>City of Seattle</b> , <i>Head of Department of Neighborhoods (while at Waldron &amp; Co.)</i>
<b>Seattle Art Museum</b> , <i>CFO</i>	<b>Expeditors International</b> , <i>Auditors</i>	<b>County of San Juan</b> , <i>County Administrator (while at Waldron &amp; Co.)</i>
<b>The Center for Courage &amp; Renewal</b> , <i>Associate Executive Director; Director of MarComm</i>	<b>Goldman Sachs</b> , <i>Private Client Reps (while at Martin Partners)</i>	<b>Hopelink</b> , <i>CEO (while at Waldron &amp; Co.)</i>
<b>The Trust for Public Land</b> , <i>NW Regional Director of MarComm (while at Waldron &amp; Co.)</i>	<b>Deloitte Consulting</b> , <i>Marketing Manager (while at Martin Partners)</i>	
<b>Zion Preparatory Academy</b> , <i>Head of School (while at Waldron &amp; Co)</i>		

Prior to his executive search experience, Norman worked in finance and marketing roles with Alaska Airlines, Blue Cross Blue Shield Association, Northwest Airlines, Continental Airlines, and The Ford Motor Company.



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### **CLEAR-Consulting.Biz In the Seattle Community**

CLEAR-Consulting.Biz's search business is grounded in the Seattle area. The firm is led by founder Norman Sigler who moved to in 2003 to work as the Finance Manager for Maintenance and Engineering at Alaska Airlines. He immediately fell in love with the beauty of Pacific Northwest. Norman ran for Mayor of Seattle and had a specific plan to help the Seattle Public School system even knowing that the Mayor does not have direct control of Seattle Public Schools. He suggested making each school a community learning center where the community would use the space in off hours and during the summer and holiday breaks. Instead of closing schools with low enrollments, invite educational and youth oriented social profits to set up shop (for a fee) in the excess space of these schools and school buildings.

Norman is committed to community and education of young people through his volunteer works (See **Attachment A** for bio). He believes education must hold the key for societal peace and prosperity and is Co-Vice Chair for [www.SoundDiscipline.org](http://www.SoundDiscipline.org), a social profit determined to help adult educators build respectful relationships with every child they encounter. This is done from a trauma informed approached to behavior and communications.

He earned an MBA in Finance and Accounting from the [Ross School of Business](#) at the [University of Michigan](#) and a BS degree in Natural Sciences and Mathematics from [Washington & Lee University](#).

### **SEARCH PROCESS**

#### **1. What Seattle Public Schools can expect from CLEAR's Search process**

CLEAR-Consulting.Biz approaches every search with the end goal of finding the most authentic individual whose vocational goals align with the goals of the client. CLEAR accomplishes this by **listening**, evaluating, and offering inquisitive **reflection**. This occurs throughout the process, from the initial meetings with the search committee of the Seattle Schools Board, district Staff, parents groups, and public and private supporters.

CLEAR takes charge of all customary aspects of search execution from candidate sourcing to successful onboarding, subject always to the input and direction of the Search Committee.

#### **2. What CLEAR requires of Seattle Public Schools**

CLEAR expects the Search Committee to:

- a. Be present throughout the entire process;
- b. Be ambassadors targeting key people within personal/professional networks; and
- c. Be available for interviews at the beginning (backgrounding to develop the position invitation) and end (full day availability for final candidate interviews and board reception).

#### **3. CLEAR's recommended timeline**



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Please see **Attachment B** for CLEAR-Consulting.Biz's 90 day timeline for the Superintendent Search.

#### **4. How CLEAR involves key stakeholders (The Search Committee, School Board, Staff, Parent Groups, Unions, Elected Officials, and The Public) in the process**

- a. The Search Committee: Partner with the Search Committee throughout the process and including a 3-month post Search review.
- b. School Board : Engage Board as ambassadors to distribute Position Invitation within their networks
- c. Staff: Work closely with Staff to develop consistent messaging within the Position Invitation, in advertising outreach, and on Seattle Public Schools' website. CLEAR-Consulting.Biz will coordinate onsite interviewing logistics (rooms, staff availability, and candidate scheduling)
- d. Parent Groups: Interview parent groups to understand their current and long term expectations
- e. The Unions: Interview leadership of each major union to understand their current and long term needs and expectations
- f. The Public: Interview present/past funders, neighborhood groups, and Educational Experts (local and national) on their expectations in a new Superintendent for Seattle Public Schools

#### **5. How CLEAR helps to ensure a diverse candidate pool.**

Once we achieve consensus on the optimal qualifications and experiences of the ideal candidate, CLEAR will identify candidates by:

- a. Developing and placing ads within ethnic and affinity groups with strong diverse audiences [i.e. Nat'l Alliance of Black School Educators, Leadership Education for Asian Pacifics, Nat'l Assn of Asian American Professionals, Nat'l Assn of Asian MBAs, Nat'l Assn of Women MBAs, Project LEAD of the United Way of King County, BAM (Blacks At Microsoft), GLEAM (Gay & Lesbian Employees At Microsoft), Center for Global Education].
- b. Seeking diverse leaders identified in newspapers, in online publications, and periodicals that highlight diverse leaders: e.g. Black Enterprise, Out Magazine, NW Asian Weekly, and others
- c. Contacting its proprietary network of over 5300+ direct LinkedIn contacts

#### **SEARCH PRICING**

1. CLEAR-Consulting.Biz agrees to a Time and Material contract at \$275 per hour with total project not to exceed \$69,000. Please see Attachment B for hourly breakdown. The relationship between Seattle Public Schools and CLEAR shall be exclusive.
2. Seattle Public Schools will be responsible for pre-approved search expenses including but not limited to candidate travel and job advertisements. These expenses are not expected to be more than \$3,500.00. CLEAR will submit all expenses for preapproval prior to incurring said





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3. All referrals of candidates from CLEAR to Seattle Public Schools will be made via a current resume of the candidate's qualifications, and will include the candidate's name and contact information.

**REFERENCES**

1. Ms. Kim Rorschach, CEO of Seattle Art Museum – [KimR@seattleartmuseum.org](mailto:KimR@seattleartmuseum.org) - 206-654-3142
2. Ms. Elizabeth Detels, Dir of HR at Seattle Art Museum – [ElizabethD@seattleartmuseum.org](mailto:ElizabethD@seattleartmuseum.org) – 206-654-3188
3. Mr. Aidan Lang, General Director of Seattle Opera – [aidan.lang@seattleopera.org](mailto:aidan.lang@seattleopera.org) – 206-676-5511
4. Ms. Nancy Del Villar Vive, Dir of HR at Seattle Opera - [nancy.vive@seattleopera.org](mailto:nancy.vive@seattleopera.org) – 206-676-5521
5. Mr. Terry Chadsey, former Executive Director of the Center for Courage & Renewal – 206-406-1293



CLEAR-Consulting.Biz shall not act as or be deemed an agent, employee, partner or joint venturer with Seattle Public Schools, and shall have no authority to make any representations on behalf of Seattle Public Schools or to bind Seattle Public Schools in any way unless specifically authorized by Seattle Public Schools to do so in a particular instance.

This Agreement is effective as of the last date signed below, and is effective until terminated by either party upon five (5) days' written notice to the other. If Seattle Public Schools terminates this Agreement, CLEAR will be entitled to all placement fees which may become payable after such termination under the terms of this Agreement. If Agreement is terminated by CLEAR, Seattle Public Schools will be entitled a refund of all fees paid.

This Agreement supersedes all previous discussions, understandings or contracts, written or oral, between Seattle Public Schools and CLEAR. This Agreement may only be modified in a writing signed by an officer of Seattle Public Schools and an authorized representative of CLEAR-Consulting.Biz. This Agreement shall be governed by and interpreted in accordance with the laws of the State of Washington, and both parties consent to the exclusive jurisdiction of and venue in the State and Federal Courts located in King County, Washington.

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**Attachment A:**

**Norman Sigler's History in the Community**

- Board Co-Vice Chair, [Sound Discipline](#) Helping educators build respectful relationships with youth by addressing the trauma behind behaviors. *2016 - Present*
- Co-Chair, Seattle Metropolitan Elections Committee (SEAMEC), a non-partisan civic organization that has evaluated and rated candidates for political and judicial office since 1977. SEAMEC evaluates candidates based on their knowledge and record of commitment to and activism for the concerns of the lesbian, gay, bisexual, transgender, and questioning community.
- Mentor in Groundbreakers Program for 6<sup>th</sup>, 7<sup>th</sup>, and 8<sup>th</sup> grade Black and African American young men in the Bellevue Schools District, *2010 – 2013*
- Adult Mentor in Bellevue Family Y's 12-month Youth & Family Leadership Program, *2012 – 2013*
- Policy Committee for the Greater Seattle Business Association, *2011 - 2013*
- Founded Annual MBA Summer Cruise for interns and 3,330 area alumni of 17 top business school local alumni clubs. The previous 9 cruises averaged 180 persons per cruise. *2003 – 2014*
- CoFounded Annual Ethnic Media Political Candidate Meet N Greet and Initiatives Debate with SeaBeez (an alliance of Ethnic media in Washington State). Initiatives Debate focusing on A State Income Tax, Charter Schools, Legalization of Marijuana, and Marriage Equality. *2010 - 2012*
- Community Advocacy & Engagement Chair, Urban Enterprise Center at the Greater Seattle Chamber of Commerce, *2010 - 2011*
- National Black MBA Association, Seattle Chapter organizing Committee *2008 - 2012*
- Seattle Metropolitan Chamber of Commerce's *2011* Family & Education Levy Task Force
- Board Member, Washington and Lee University Alumni Association, *2007 – 2011*
- Organizing Member of PUGET SOUND CONNECTIONS®, a multicultural network for new-to-the-area professionals. This network was designed to enhance employment experiences of diverse professional newcomers by making them feel welcomed, connecting them with established business and civic leaders, and helping them become involved in the community. The four city



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wide events were attended by over 1,000 people representing diversity from most companies in the Seattle area

- President of Puget Sound Chapter of Washington and Lee University Alumni Association, 2003 – 2007
- [Project LEAD](#) (Leadership, Effectiveness And Diversity) graduate, a United Way of King County Board Development Program, Spring 2005
- Board Member, Seattle Repertory Theatre Crew (under 40 subscriber group), 2004 – 2008
- President, University of Michigan Business School Club of Chicago, 1999 – 2002
- Elected to Local School Council of Chicago Public School: Newberry Academy for Math & Sciences 2000 - 2002



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**Attachment B:**

**Seattle Public Schools Superintendent Search  
Hourly Timeline**

Activity	Nov	Dec	Jan	Total Hours
<b>Search Agreement Signed</b>				
Client Background Interviews Scheduled with Relevant Staff, Board & Community Partners	32			
Position Invitation Draft sent to Search Committee	4			
Position Invitation Finalized	2			
Target Company/Org List Finalized	2			
Do Not Call (People and Firms) List Finalized	1			
Ad Placement List Approved	1			
Sourcing Calls and Contacts	60			
Search Committee Weekly Updates Begin – 1 <sup>st</sup> Mon of every week	2			
Sourcing Calls and Contacts continued		40		
<b>Search Update</b>		4		
Norman Sigler Interviewing Candidates		50		
Top 15 Candidates Reviewed with Search Committee – Top 6 identified		15		
<b>Search Update</b>			4	
Top 6 Candidates Interviewed at Seattle Public Schools			8	
Candidate Education, Criminal, and Employment History Checked			4	
Top 2 - 3 Candidates identified			1	
Top 2 - 3 Candidate References Done			9	
<b>Meet the 2- 3 Candidates Reception with Board, Staff and other Stakeholders</b>			5	
Final 2 - 3 Candidates Interview with Selection Committee			4	
<b>Offer Extended / Candidate Starts</b>				
<b>Total Hours</b>	<b>104</b>	<b>113</b>	<b>33</b>	<b>250</b>
<b>Total Anticipated Cost at \$275/hour</b>	<b>\$28,600</b>	<b>\$31,075</b>	<b>\$9,075</b>	<b>\$68,750</b>

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### **CLEAR-Consulting.Biz's Communications Touchstones**

CLEAR-Consulting.Biz aspires to embrace communication within our CLEAR Touchstones™:  
Positive, Present, and Respectful.

- 🌐 To be **POSITIVE** - within Intent and Action: The Individual opportunity is to provide the truest, most positive beliefs within the authentic intention of developing, fostering, and facilitating all that is good and kind. To be Positive is to honestly welcome dialogue inclusive of differing and difficult conversations that is worthy of active intelligent support. The use of positive words that speak to “what is” and “what is desired”. Speaking from an established and accountable SELF where “I” means “I” and “YOU” means the person with whom you are talking
- 🌐 To offer **PRESENCE** - Honest Presence in the Now: The process of uniting our individual positions in partnership with those of new and differing positions is a valuable ability of presence in the moment. Partnership originates in the individual MIND and extends as an exercise wherein the individual Explores, with another, Action and Ability in the “Mental and Physical Now”. AFFIRMATION: *"I want to be present with my beliefs based in the current moment and situation"*. Partnership is an attribute of listening to opposing ideas while respecting those differing positions as response-able allies in the evolution of creative partnership.
- 🌐 To Agree within **RESPECT** - Accountable Listening, Purposeful Sharing and Speaking: Inclusive Diversity is the welcome process of Communal Trust of Listening, Acknowledging, and Speaking. Participation within listening is twice as important as the active participation found in speaking. Release the need to Fix. Share & Listen with the intention to reflect the authentic journey of the truth holder, while releasing the desire to fix, label, ease and solve. Embrace differences and difficult situations with open and honest questions of empathy and genuine wonder for Self and Others.



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**REQUEST FOR PROPOSAL NO. RFP10712**

**PROPOSAL CERTIFICATION FORM**

**To: Diane T. Navarro, Contracting Services Manager**

**The undersigned provider hereby certifies as follows:**

1. That he/she has read the Seattle School District's Request for Proposal No. RFP10712 and the following Addenda and to the best of his/her knowledge has complied with the mandatory requirements stated herein:

**Addenda Number**

**Issue Date**

\_\_\_\_\_

\_\_\_\_\_

2. That he/she has had the opportunity to ask questions regarding the Request for Proposal, and that if such questions have been asked; they have been answered by the District.
3. That the proposer's response is valid for 90 days.

**Dated at Monday, this 30<sup>th</sup> day of October 2017.**

Norman Sigler  
(Signature)

Managing Director  
(Title)

NORMAN SIGLER  
(Print Name)

[Norman@CLEAR-Consulting.Biz](mailto:Norman@CLEAR-Consulting.Biz)  
(Email Address)

CLEAR-Consulting.Biz  
(Company Name)

206-414-9159  
(Telephone Number)

4701 SW Admiral Way, #293  
(Address)

Seattle  
(City)

603 378 905  
(UBI Number)

Washington  
(State)

98116  
(Zip)



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**CERTIFICATE OF INSURANCE**

Furnished Upon Request

*RFP No. RFP10712*

*A Proposal Prepared for*

**Seattle**  
**Public Schools**  
**Seattle, Washington**

*for*

*The Search and Selection of a  
Superintendent of Schools*

*submitted by*

**MCPHERSON**  **JACOBSON, LLC**

EXECUTIVE RECRUITMENT & DEVELOPMENT



7905 L St., Suite 310  
Omaha, Nebraska 68127  
Phone: 888-375-4814/402-991-7031  
Fax: 402-991-7168  
Email: [mail@macnjake.com](mailto:mail@macnjake.com)  
Website: [www.macnjake.com](http://www.macnjake.com)



**REQUEST FOR PROPOSAL NO. RFP10712****PROPOSAL CERTIFICATION FORM**

TO: Diane T. Navarro, Contracting Services Manager

The undersigned provider hereby certifies as follows:

1. That he/she has read the Seattle School District's Request for Proposal No. RFP10712 and the following Addenda and to the best of his/her knowledge has complied with the mandatory requirements stated herein:

Addenda Number

N/A

Issue Date

2. That he/she has had the opportunity to ask questions regarding the Request for Proposal, and that if such questions have been asked; they have been answered by the District.
3. That the proposer's response is valid for 90 days.

Dated at 12 pm, this 25 of October 2017.  
(Signature)Owner/CEO  
(Title)Thomas Jacobson  
(Print Name)mail@macnjake.com  
(Email Address)McPherson+Jacobson, L.L.C.  
(Company Name)888-375-4814  
(Telephone Number)7905 L St., Suite 310  
(Address)402-991-7168  
(Fax Number)Omaha  
(City)602-717-455  
(UBI Number)NE  
(State)68127  
(Zip)



MCPherson *MJ* JACOBSON, LLC

EXECUTIVE RECRUITMENT & DEVELOPMENT

7905 L STREET, SUITE 310 ♦ OMAHA, NEBRASKA 68127 ♦ 402-991-7031/888-375-4814  
FAX: 402-991-7168 ♦ EMAIL: [MAIL@MACNJAKE.COM](mailto:MAIL@MACNJAKE.COM) ♦ WEBSITE: [WWW.MACNJAKE.COM](http://WWW.MACNJAKE.COM)

October 25, 2017

Board of Directors  
Seattle Public School  
2445 3<sup>rd</sup> Ave. S.  
Seattle, Washington 98134

Thank you for the opportunity to respond to your RFP No. 10712, Consulting Services for Superintendent Search. The enclosed proposal describes the professional services McPherson & Jacobson, L.L.C. will provide Seattle Public Schools in ensuring your superintendent search secures quality leadership for the district. We apologize for exceeding the 15-page limit, the additional pages were needed to adequately respond to the questions in the RFP.

Our firm's five-phase protocol allows the board to concentrate on the most important segments: the interview and selection of the successful candidate. Our team of consultants, working in conjunction with the board and stakeholder groups you identify, will implement a systematic, comprehensive process culminating in the hiring of the most qualified candidate for your district.

With over 100 consultants across the United States, McPherson & Jacobson has been successfully conducting searches for governing boards since 1991.

Our contact information:

McPherson & Jacobson, L.L.C.  
7905 L St., Suite 310  
Omaha, Nebraska 68127  
Telephone: 402-991-7031/888-375-4814  
Fax: 402-991-7168  
Email: [mail@macnjake.com](mailto:mail@macnjake.com)

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

Sincerely,

*Thomas Jacobson*

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

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This proposal is the property of McPherson & Jacobson L.L.C. and has been prepared at the request of the Seattle Public Schools, Seattle, Washington. The contents of this proposal are not to be reproduced or distributed for any reason other than for use by the Seattle Public Schools, Seattle, Washington.

## ***Executive Summary***

### ***“It’s About the Kids”***

*WE BELIEVE every student is entitled to a high-quality education. We strongly believe quality education is dependent upon quality leadership.*

*OUR MISSION is to ensure your search results in quality leadership for education excellence.*

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

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

## ***Company Profile and Qualifications of Team Members***

### **Leading National Search Firm**

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 675 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 100 consultants** across the nation. Over one-fourth of McPherson & Jacobson consultants are minorities or female. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensures your search results in quality leadership for education excellence.

### **Sustainability in Leadership**

Waters and Marzano (2006) 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 seventy-five percent** of administrators are in the position for which they were hired. **Over fifty percent** of administrators are still in the position for which they were hired within the past ten years. **Almost half** of the administrators selected by governing boards within the past 15 years continue in the position for which they were hired.

### **Contact Information**

McPherson & Jacobson, LLC.  
7905 L St., Suite 310  
Omaha, Nebraska 68127  
Ph. 888-375-4814  
Email: [mail@macnjake.com](mailto:mail@macnjake.com)  
Website: [www.macnjake.com](http://www.macnjake.com)

## ***Consultants for Seattle Public Schools***

The lead consultant for the Seattle Public Schools superintendent search would be Dr. Thomas Jacobson, the owner/CEO of McPherson & Jacobson. Dr. Steve Joel, the firm's primary recruiter, and Dr. Steven Lowder will be assisting Dr. Jacobson. Below is a brief background for each consultant, their resumes follow.

**Dr. Thomas Jacobson** has an extensive background in education ranging from teacher to superintendent. Since 1991, he has conducted over 250 searches for school districts ranging in size from 200 to over 300,000 students, including being the lead consultant for: Clark County School District, Las Vegas, Nevada; Little Rock School District, Little Rock, Arkansas; Orange County Public Schools, Orlando, Florida; Jefferson County Public Schools, Louisville, Kentucky; Fayette County Public Schools, Lexington, Kentucky; Duval County Schools, Jacksonville, Florida; Wake County Public School System, Cary, North Carolina; Paso Robles Joint Unified School District, Paso Robles, California; Fallbrook Union High School District, Fallbrook, California; and Charlotte-Mecklenburg Schools, Charlotte, North Carolina.

**Dr. Steve Joel** is a lifelong educator. He is currently the superintendent of Lincoln (NE) Public Schools, the second largest school district in Nebraska. He has conducted over 45 superintendent searches. Dr. Joel is McPherson & Jacobson's primary recruiter; for Clark County Schools District, Las Vegas, Nevada, he recruited over 30 applicants. Dr. Joel also extensively recruited candidates for Little Rock School District, Little Rock, Arkansas; Orange County Public Schools, Orlando, Florida; Jefferson County Public Schools, Louisville, Kentucky; Fayette County Public Schools, Lexington, Kentucky; Duval County Schools, Jacksonville, Florida; Wake County Public School System, Cary, North Carolina; Sunnyside Unified School District, Tucson, Arizona; Charlotte-Mecklenburg Schools, Charlotte, North Carolina; and Dysart Unified School District, Surprise, Arizona.

**Dr. Steve Lowder** is also a lifelong educator, spending more than 30 years as a public school administrator including serving as a Superintendent in Idaho, Oregon, and California. In 2014, he retired as the Superintendent of Stockton Unified School District in Stockton, California. He has experience conducting superintendent searches and board development workshops.

**Thomas Jacobson**  
**6930 S. 163<sup>rd</sup> Circle**  
**Omaha, NE 68136**  
**Email: t\_jacobson@macnjake.com**  
**Phone: 402-943-7540**

**Educational Background**

Ph.D.	1986	University of Minnesota, Minneapolis, MN	Ed. Admin.
Ed.S.	1980	University of Minnesota, Minneapolis, MN	Ed. Admin.
M.S.	1973	St. Cloud State University, St. Cloud, MN	Ed. Admin.
B.S.	1969	Bemidji State University, Bemidji, MN	Elem. Ed.

**Professional Experience**

<b>Dates</b>		<b>Title</b>	<b>District</b>	<b>Location</b>
1996	to Present	CEO/Owner	Key Concepts, L.L.C.	Omaha, NE
1991	to Present	CEO/Owner	McPherson & Jacobson, L.L.C.	Omaha, NE
1991	to Present	Associate Professor	Univ. of Nebraska at Kearney	Kearney, NE
1988	to 1991	President	Consortium for School Improvement	Gunnison, CO
1986	to 1990	Superintendent	Gunnison Watershed School District	Gunnison, CO
1987	to 1989	Adjunct Professor	Western State College	Gunnison, CO
1980	to 1986	Superintendent	Remer/Longville ISD #118	Remer, MN
1982	to 1984	Supervising Superintendent	Tri-County Coop	Grand Rapids, MN
1979	to 1980	Assistant Superintendent for Curriculum, Instruction, and Personnel	Remer/Longville ISD #118	Remer, MN
1975	to 1979	Elementary Principal	Remer/Longville ISD #118	Remer, MN
1969	to 1975	Elementary Teacher	Mounds View ISD #621	Mounds View, MN

## **Professional Organization Memberships**

American Association of School Administrators

Educational Administration Department Chair Search Committee Chairperson 2007

College of Education Rank and Tenure Committee 1997-2007

Nebraska Counsel of School Administrators

    NCSA Region IV Past President 1998

    NCSA Region IV President 1997

    NCSA Region IV Vice President 1996

Nebraska School Masters

Horace Mann League



**Steve Joel**  
**5524 S. 88<sup>th</sup> Street**  
**Lincoln, NE 68526**  
**Email: s\_joel@macnjake.com**  
**Phone: 402-525-3221**

**Educational Background**

Ed.D.	1991	Kansas State University, Manhattan, KS	Ed. Admin.
M.Ed.	1981	University of Nebraska-Lincoln, Lincoln, NE	Ed. Leadership
B.A.	1976	Doane College, Crete, NE	History Education

**Professional Experience**

Dates			Title	District	Location	Enrollme
2010	to	Present	Superintendent	Lincoln Public School District	Lincoln, NE	38,000
2005	to	Present	Instructor, Leadership Practice	Doane University	Crete, NE	
2000	to	2010	Superintendent	Grand Island Public School District	Grand Island, NE	9,000
1996	to	Present	Consultant and Executive Director	McPherson & Jacobson, L.L.C.	Omaha, NE	
1992	to	2000	Superintendent	Beatrice Public School District	Beatrice, NE	2,000

**Related Professional Experience**

1992-present Numerous national presentations and several publications on leadership, goal setting, developing performance objectives, developing board operating principles.

1992-present Motivational speaker and strategic planning facilitator

Urban Superintendent's Board of Directors

ERDI – Advisory Council

Mentor / Instructor for AASA Urban Superintendent's Academy

**Steven Lowder**  
**4605 NW 139<sup>th</sup> Loop**  
**Vancouver, WA 98685**  
**Email: s\_lowder@macnjake.com**  
**Phone: 951-719-6551**

### **Educational Background**

Ed.D.	1992	University of Southern California, Los Angeles, CA	Educational Policy, Planning, and Administration: Curriculum and Instruction Emphasis
M.A.	1985	Humboldt State University, Arcata, CA	Educational Supervision Emphasis
B.A.	1975	Humboldt State University, Arcata, CA	Liberal Studies: Math/Science Emphasis

### **Professional Experience**

<b>Dates</b>			<b>Title</b>	<b>District</b>	<b>Location</b>	<b>Enrollment</b>
2014	to	Present	Consultant	McPherson & Jacobson, L.L.C.	Omaha, NE	
2012	to	2014	Superintendent	Stockton Unified School District	Stockton, CA	39,000
2010	to	2012	Superintendent	Hemet Unified School District	Hemet, CA	22,000
2005	to	2010	Superintendent	Lincoln Unified School District	Stockton, CA	8,000
2000	to	2005	Superintendent	Tigard-Tualatin School District 23J	Tigard, OR	12,000
1998	to	2000	Assistant Superintendent	(Meridian) Joint School District No. 2	Meridian, ID	30,000
1995	to	1998	Superintendent	McCall-Donnelly Joint School District No. 421	McCall, ID	1,000
1995	to	1998	Superintendent	Meadows Valley School District No. 11	Meadows Valley, ID	200
1985	to	1995	Superintendent	Rio Dell Elementary School District	Rio Dell, CA	200
1980	to	1985	Superintendent/ Principal	Cuddeback Union Elementary School District	Carlotta, CA	100

## ***Awareness and Understanding of Seattle and Seattle Public Schools***

Seattle Schools like most urban school districts face common issues such as student achievement, Closing the Achievement Gap, funding and budget concerns, governmental regulations, dropout and graduation rates, changing patterns in student enrollment, and gaining the public's trust. McPherson & Jacobson consultants were confronted with similar concerns when we conducted searches in other urban school districts (listed in the Experience, Capabilities, and Availability & Capacity Section).

We take the entire board through a consensus decision-making process to identify the top criteria for the selection of the new superintendent. We will also meet with school and community groups to ensure broad-based stakeholder input in the selection process.

McPherson & Jacobson has conducted approximately 100 superintendent searches in the northwest United States, with over 75 in the State of Washington.

# ***Project Approach***

## ***Five Phases of a Superintendent Search***

### ***Phase I***

Working with the Board, and stakeholder groups identified by the Board, McPherson & Jacobson's consultants will:

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

Using Nominal Group Technique, 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***

In Phase II McPherson & Jacobson's consultants will:

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

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

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

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

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

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

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

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

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

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

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

McPherson & Jacobson's staff will create an application form requiring applicants to describe their strengths and experiences relating to each criterion identified by the

board. This will be one of the preliminary screening devices used by the consultants when assessing potential candidates.

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

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

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

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

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

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

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

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

✓ **Confidentiality of Applicants**

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

In Phase III McPherson & Jacobson's consultants will:

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

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

✓ **Conduct reference checks.**

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

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

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

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

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

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

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

***Phase IV***

In Phase IV McPherson & Jacobson's consultants will:

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

The consultants will present a complete list of applicants, who completed the application process, to the board for its review. We do not eliminate any applicants;

however, a short list will be submitted of those applicants who we found most closely met the district's criteria. The consultants will present a reference profile demonstrating the consistent feedback for each short list applicant.

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

✓ **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.

✓ **Conduct background checks.**

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

### ***Phase V***

In Phase V McPherson & Jacobson's consultants will:

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

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

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

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

✓ **Provide a guarantee.**

If the board chooses to use our complete service, we will guarantee our process. 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.

***Proposed timeline*** (can be changed to meet the needs of the district and board)

- At the beginning of the search (**November 2017**)
  - Advertising decisions are made
  - The qualities for the new superintendent are identified
  - Application information is posted
  - A formal timeline is established
  - A brochure is created to advertise the district and the vacancy
- At the time designated by the board (**November/December 2017**)
  - Stakeholder group meetings are held
  - A summary of stakeholder input is presented to the board
- As applications arrive in our office
  - Applications are monitored and applicants are notified of the deadlines to submit their materials
- After the closing date (**Late February 2018—after AASA**)
  - All the completed applicant files are forwarded to the consultants
  - The consultants begin the review and pre-interview process
- Approximately two to four weeks after the closing date (**mid-March 2018**)
  - Consultants provide information to the board on all applicants who completed the process
  - Consultants present summary profiles and video interviews of qualified candidates to the board
  - The board selects the candidates it wants to interview
  - McPherson & Jacobson notifies each applicant not selected for an interview
- Soon after the board selects their candidates (**late March 2018**)
  - Semi-finalist interviews are conducted (if chosen by the board)
  - The board interviews its final candidates
  - The board selects their new superintendent (**April 2018**)
  - A criminal/financial/credential verification background check is conducted on the selected candidate
  - McPherson & Jacobson's consultants contact each candidate who was interviewed to notify them of their status

## ***Stakeholder Involvement***

### **Initial stakeholder input sessions**

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

### **Meeting the candidates**

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

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

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

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

**Process for Obtaining Parent and Community Input**

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

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

**Process for Obtaining Online Stakeholder Input**

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

## ***Experience, Capabilities, and Availability & Capacity***

The consultants proposed are not engaged in any searches or other projects that would affect the timeline of a superintendent search for Seattle Public Schools.

McPherson & Jacobson has over 100 consultants located across the United States; this allows us to tailor each search to the timeline that best meets the needs of the board—while still giving the search our utmost attention.

Below is a list of urban searches we have completed:

### **Charlotte-Mecklenburg Schools— Enrollment: 145,363**

600 E. Fourth St., Fifth Floor

Charlotte NC 28202

School Phone: 980-343-5139

School District Contact: George Battle

Board Contact: Mary McCray 704-281-6004

Search year: 2015-2016

### **Elk Grove Unified School District— Enrollment: 62,000**

9510 Elk Grove-Florin Rd.

Elk Grove CA 95624

School Phone: 916-686-5085

School District Contact: Arlene Hein

Board Contact: Priscilla Cox 916-689-3518

Search year: 2014-2015

### **Wake County Public School System—Enrollment: 146,687**

5625 Dillard Dr.

Cary NC 27518

School Phone: 919-431-7400

School Contact: Melissa Allen

Board Contact: Keith Sutton, 919-606-6572

Search year: 2012-2013

### **Little Rock Public Schools—Enrollment 25,743**

810 West Markham St.

Little Rock, AR 72201

District Phone: 501-477-1000

Board President: Melanie Fox, 501-664-6331

Search year: 2012-2013

### **Reynolds School District—Enrollment: 14,000**

1204 NE 201st Ave.

Fairview OR 97024

School Phone: 503-661-7200

Board Contact: Theresa Delaney Davis 503-489-4316

Search year: 2011-2012

**Duval County Public Schools—Enrollment 125,188**

1701 Prudential Dr.  
Jacksonville FL 32207  
School Phone: 904-390-2000  
School District Contact: Bonnie Cole  
Board Contact: Betty Seabrook Burney/W.C. Gentry 904-390-2293  
Search Year: 2011-2012

**Orange County Public Schools—Enrollment: 179,000**

445 W Amelia St.  
Orlando FL 32801  
School Phone: 407-317-3200  
School District Contact: Kathy Palmer, 407-317-3322  
Board Contact: Bill Sublette, 407-317-3236  
Search year: 2010-2011

**Jefferson County Public Schools—Enrollment: 99,775**

3332 Newburg Rd.  
Louisville, Kentucky 40218  
District Phone: 502-485-3011  
District Contact: Rosemary Miller, 502-485-3154  
Board Contact: Stephen Imhoff, 502-899-2414  
Diane Porter 502-502-775-5048  
Search year: 2010-2011

**Fayette County Public Schools—Enrollment: 37,000**

701 East Main St.  
Lexington KY 40503  
School Phone: 859-381-3877  
School District Contact: Mary Wright, 859-381-4165  
Board Contact: John Price, 859-263-2460  
Search year: 2010-2011

**Clark County School District—Enrollment: 309,476**

5100 W. Sahara  
Las Vegas, Nevada 89146  
District Phone: 702-799-5000  
School District Contact: Bramby Tollen (Director, Purchasing, Warehouse) 702-799-5225x5461/Thomas Nacos (Director I, Purchasing) 702-855-5464  
Board Contact: Carolyn Edwards/Sheila Moulton 709-799-1072/702-431-8575  
Search year: 2009-2010

## ***References***

### **Charlotte-Mecklenburg Schools— Enrollment: 145,363**

600 E. Fourth St., Fifth Floor

Charlotte NC 28202

School Phone: 980-343-5139

School District Contact: George Battle

Board Contact: Mary McCray 704-281-6004

Search year: 2015-2016

### **Elk Grove Unified School District— Enrollment: 62,000**

9510 Elk Grove-Florin Rd.

Elk Grove CA 95624

School Phone: 916-686-5085

School District Contact: Arlene Hein

Board Contact: Priscilla Cox 916-689-3518

Search year: 2014-2015

### **Wake County Public School System—Enrollment: 146,687**

5625 Dillard Dr.

Cary NC 27518

School Phone: 919-431-7400

School Contact: Melissa Allen

Board Contact: Keith Sutton, 919-606-6572

Search year: 2012-2013

## *Pricing*

### *Investment*

**The investment for conducting the superintendent search is \$29,900 for Phases I-V.**

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.

**Expenses in addition to the consulting fee are:** cost of media advertisement selected by the board; office expenses; telephone charges for reference checks; travel and expenses for consultants in district visits; consultants' attendance at the interviews or additional meetings. All expenses will be explained and agreed to prior to the commitment of the search process. **McPherson & Jacobson is willing to provide a maximum not to exceed amount, which includes the fee and expenses.**

#### **Estimate of expenses:**

<b>I. Advertising Expenses</b>	<b>\$ 1,000*</b>
<b>II. Travel Expenses</b>	<b>\$ 9,900**</b>
<b>III. Office Expenses</b>	<b>\$ 800***</b>
<b>IV. Video interviews of short list candidates (\$50/candidate)</b>	<b>\$ 250^</b>
<b>V. Criminal/Financial Background Checks</b>	<b>\$ *****</b>

\* Includes 30 days on American Association of School Administrators website (AASA.org) and 30 days on TopSchoolJobs.org, this amount will increase if the board chooses additional advertising media.

\*\* Includes travel, lodging, and meals for all consultants for the trips included in the proposal to the district. *(This expense includes two (2) teams of two (2) consultants for five (5) days of stakeholder meetings. This amount may decrease or increase dependent upon the number of stakeholder meetings the board chooses to have McPherson & Jacobson conduct.)*

\*\*\* Includes development and printing of Announcement of Vacancy, copying costs, telephone expenses, and postage

^Estimated based on a majority of searches having five shortlist candidates. The expense will vary based on the number of shortlist candidates.

\*\*\*\*\* Included in the fee is the criminal/financial/credential verification background check for the selected candidate. If the board chooses to conduct background checks on all the finalist candidates, the district will be charged the actual cost for the background check, a minimum of \$125 per candidate.

#### **NOTE:**

- Interview expenses for the candidates are not included in the expenses listed above.
- There is an additional fee and expenses for the consultants to attend the interview sessions.



### ***Price Breakdown for Search Activities***

<b>Phase</b>	<b>Description of Services</b>	<b>Fee</b>	<b>Expenses</b>	<b>Additional Costs/Notes</b>
I	Meet with board to start search process. Start development of application materials. Initiate advertising.	\$6,750	\$3,050	Expenses include consultant travel and \$1,000 in advertising costs. Advertising costs are determined by the media selected by the board; therefore, this amount is an estimate only.
II	Conduct stakeholder input meetings. Begin candidate recruitment.	\$7,750	\$5,050	Expenses are based on two (2) teams of two (2) consultants conducting stakeholder meetings for five (5) days. If the board chooses additional meetings beyond the five (5) days, the expenses will increase. The fee for additional days of stakeholder meetings is \$500 per day per consultant plus expenses.
III	Continue candidate recruitment. Conduct reference checks on applicants.	\$7,750	\$ 300	Expenses include office expenses for candidate recruitment and conducting reference checks.
IV	Meet with the board to review applicants and identify finalists to be interviewed. Assist board with interview questions and schedule. Coordinate candidate visits to the district.	\$6,750	\$2,350	Expenses include preparation of materials, consultant travel expenses and video interviews of five (5) candidates. Fee does not include consultants being present for the interviews. If the board requests a consultant be present for the interviews, the additional fee is <u>\$500</u> per day plus expenses.
V	Meet with the board to determine the superintendent performance objectives.	\$ 900	\$1,200	Expenses include preparation of materials and consultant travel expenses.
<b>Totals</b>		<b>\$29,900</b>	<b>\$11,950</b>	<b>Fees and/or expenses will increase if</b> <ol style="list-style-type: none"> <li><b>1. the board chooses advertising media over \$ 1,000;</b></li> <li><b>2. the board requests more than five (5) days of stakeholder input sessions;</b></li> <li><b>3. The board requests more than 5 shortlist candidate videos</b></li> <li><b>4. the board requests consultants be present at meetings not included above, including interviews;</b></li> <li><b>5. actual travel costs increase due to changing prices.</b></li> </ol>
	<b>Total*</b>	<b>\$41,850</b>		<i>*based on parameters above</i>

# ***A Proposal for the Selection of a Superintendent***

*Presented To:*



*Submitted By:*

***Ray and Associates, Inc.***

**CORPORATE OFFICE  
4403 1<sup>ST</sup> AVENUE SE, SUITE 407  
CEDAR RAPIDS, IOWA 52402-3221  
PHONE: 319-393-3115  
FAX: 319-393-4931  
E-mail: [glr@rayassoc.com](mailto:glr@rayassoc.com)  
Website: [www.rayassoc.com](http://www.rayassoc.com)**

**NORTHWESTERN OFFICE  
1079 13<sup>TH</sup> LANE  
FOX ISLAND, WASHINGTON 98333  
PHONE: 319-393-3115  
FAX: 319-393-4931  
E-mail: [glr@rayassoc.com](mailto:glr@rayassoc.com)  
Website: [www.rayassoc.com](http://www.rayassoc.com)**

## ***Finding Leaders for America's Schools***

Executive Plaza Building  
4403 First Avenue SE, Suite 407  
Cedar Rapids, IA 52402

Phone: 319-393-3115  
Fax: 319-393-4931  
Email: [glr@rayassoc.com](mailto:glr@rayassoc.com)  
Website: [www.rayassoc.com](http://www.rayassoc.com)

## **Ray and Associates, Inc.**

***Leaders in Executive Searches***

October 20, 2017

Seattle Public Schools  
ATTN: Ms. Sue Peters, Board President  
2445 Third Avenue South  
Seattle, WA 98134

Dear Ms. Peters and Members of the Board of Education:

This letter is in response to a request regarding the need for our services to assist you in the search for a new Superintendent. We are confident the Board will be quite pleased with the services we can provide. We have been very successful in providing Superintendent search services for districts that are similar in terms of size, cultural diversity and geographic location.

As I am sure you are aware, the selection of Superintendent will be one of the most important activities your Board will perform. The Board's success in the search process will affect your school district's education program for years to come. It is extremely important to find the "right fit" for the District.

We are familiar with Seattle as we have conducted several successful searches for Seattle Public Schools. We are familiar with Washington as we recently completed the successful Superintendent searches for Mercer Island School District, Bellevue School District and Northshore School District and previously assisted Kent School District, Port Angeles School District, Tacoma Public Schools, Ferndale School District and Federal Way Public Schools, Washington with their Superintendent searches. In the Western region, we have conducted searches for Juneau City School District and Anchorage School District, Alaska; Poway Unified School District, San Ysidro School District, Albany USD, Berkeley USD, Pasadena USD and Emery USD, California; Blaine County School District, Idaho; Albuquerque Public Schools, Los Alamos Public Schools and Santa Fe Public Schools, New Mexico; Hawaii School of Deaf and Blind, Hawaii; Roosevelt Elementary School District, Deer Valley Unified School District and Gilbert Public Schools, Arizona; Gresham-Barlow School District, Salem-Keizer Public Schools, Lake Oswego School District, Eugene School District 4J, Hood River County School District and Medford School District 549C, Oregon; and Jeffco Public Schools, Flagstaff Academy and Eagle County Schools, Colorado.

Nationally we have assisted Greenwich Public Schools, Bridgeport Public Schools, Hartford City Public Schools and the Consolidated School District of New Britain, Connecticut; Wyandanch Union Free School District and Amityville Union Free School District, New York; Anne Arundel County Public Schools, Howard County Public School System, Wicomico County Public Schools and Prince George's

County Public Schools, Maryland; Lewisburg Area School District, Wissahickon School District, Millville School District, Montgomery County Intermediate Unit and Benton Area Public School District, Pennsylvania; Trenton Public Schools, East Orange School District, Camden City Public Schools and Marlboro Township Public Schools, New Jersey; Dover School District, New Hampshire; Montgomery County Public Schools, Mecklenburg County Schools, Bedford County Schools, Newport News Public Schools, Hampton City Schools, Prince William County Public Schools and Williamsburg-James City Schools, Virginia; Savannah-Chatham County Public School System, Georgia; Maury County Public Schools, Knox County Schools, Oak Ridge Schools and Sumner County Schools, Tennessee; Rogers Public Schools, Cotter Public Schools, Mountain Home Public Schools and Fayetteville Public Schools, Arkansas; The School District of Palm Beach County, Florida State University Schools, Brevard Public Schools and Collier County Public Schools, Florida; Austin ISD, Plano ISD, Lewisville ISD, Fort Worth ISD, Killeen, ISD and Socorro ISD, Texas; Beaufort County School District, Jasper County School District and Richland County School District One, South Carolina; Cincinnati Public Schools and Lorain City Schools, Ohio; Saint Paul Public Schools and Lakeville Area School District, Minnesota; Vermillion School District, South Dakota; Detroit Public Schools Community District, Ecorse Public Schools, Benton Harbor Area Schools and Ann Arbor Public Schools, Michigan; Joplin Schools and Kansas City Public Schools, Missouri; and Glenbrook North and Glenbrook South High Schools, Joliet School District and Township School District #113, Illinois.

We have also assisted the Hawaii Department of Education, Colorado Department of Education, West Virginia Department of Education, Ohio Department of Education, Florida Department of Education, Rhode Island Department of Education, Michigan Department of Education and Wyoming Department of Education with their State Superintendent searches.

We are a national search firm that is uniquely equipped to assist you in the selection of a Superintendent who meets your particular needs and qualifications. We will not only advertise, but also actively recruit potential candidates that will meet the criteria established by your Board, including women and minorities. Most other search firms do not seek out candidates for a position as we do for our clients. With our extensive regional and national associate base, Ray and Associates, Inc. will be able to recruit quality candidates from around the country, as well as within the state. We have often found excellent in-state candidates who would not otherwise have applied for the position due to a possible conflict of interest with a state or local firm. Our professional, objective procedures allow us to attract, process and screen the most successful candidates for a Superintendent position. You will also find our system is flexible, which allows us to customize the search to meet the desires of the Board.

Our firm frequently exhibits at the National School Boards Association (NSBA), National Association of Secondary School Principals (NASSP), the American Association of School Administrators (AASA), Council of Great City Schools (COGCS), the Association of Latino Administrators and Superintendents (ALAS) and the National Alliance of Black School Educators (NABSE), as well as other professional organizations, for over forty-two (42) years. This year the firm exhibited and presented at numerous state school board associations. Exhibiting and presenting at these state and national organizations allows the firm to meet and recruit outstanding administrators for our clients.

It is our goal to make the selection process professional, efficient and successful to assure your complete satisfaction with our services. It is quite common for an urban Board to be concerned about the quality of diverse candidates who might be available in today's job market. Outstanding administrators will need to be recruited regardless of the time of year or the position needing to be filled because many of these school leaders already have good jobs. We feel that our firm can be very successful in attracting candidates that will meet or exceed your expectations. With a consulting firm of over one hundred

seventy (170) associates located nationwide, Ray and Associates, Inc. has been able to develop the most comprehensive pool of candidates of any executive search firm in the country. Our reputation for success is built upon providing school districts precisely the type of candidate that satisfies not only the Board but the community and faculty as well.

Ray and Associates, Inc. strives to provide the district with the best match possible based on what we learn in our extensive interaction with the Board and key players in the search. It is our desire to activate our network on your behalf to locate individuals that can effectively assume the top executive post in your District.

We welcome the opportunity to make a presentation of our services at your convenience. If you have any further questions or comments regarding the enclosed information, please do not hesitate to contact our Cedar Rapids office at 319-393-3115.

Sincerely,

A handwritten signature in cursive script, appearing to read "R. M. Ray".

Ryan M. Ray  
President

**REQUEST FOR PROPOSAL NO. RFP10712****PROPOSAL CERTIFICATION FORM**

TO: Diane T. Navarro, Contracting Services Manager

The undersigned provider hereby certifies as follows:

1. That he/she has read the Seattle School District's Request for Proposal No. RFP10712 and the following Addenda and to the best of his/her knowledge has complied with the mandatory requirements stated herein:

Addenda Number

N/A

Issue Date

N/A

2. That he/she has had the opportunity to ask questions regarding the Request for Proposal, and that if such questions have been asked; they have been answered by the District.
3. That the proposer's response is valid for 90 days.

Dated at Cedar Rapids, IA this 30<sup>th</sup> of October 2017.Molly Schuff  
(Signature)Molly Schwarzhoff  
(Print Name)Ray and Associates, Inc  
(Company Name)4403 1<sup>st</sup> Ave SE Suite 407  
(Address)Cedar Rapids  
(City)Iowa  
(State)52402  
(Zip)Vice-President  
(Title)glr@rayassoc.com  
(Email Address)319) 393-3115  
(Telephone Number)319) 393-4931  
(Fax Number)01-4991919  
(UBI Number)

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### 3. Executive Summary

#### EXECUTIVE SUMMARY

Ray and Associates, Inc. is fully capable of meeting all the requirements of RFP No. RFP09410. We clearly understand the search process that is necessary for a large, urban school district to follow to be successful. In fact, we very typically receive more fully completed applications for the districts we represent than any other search firm in the country.

We strongly believe in building an accurate profile for the position and then recruiting specifically to the criteria of that profile. This involves interviewing and surveying board members as well as any constituencies as identified by the board. Our search involves recruiting for candidates with the appropriate skill sets and personality traits that will be a close fit for our client districts.

Ray and Associates, Inc. maintains a working relationship with key individuals at the college and university level along with other national public and private organizations for the purpose of recruiting outstanding candidates. However, we are not directly connected with any college, university, or any other organization. This allows our firm to be objective in the search process. As a national firm, we stay abreast of the performance of outstanding school administrators throughout the country, which has contributed to our high success rate.

Our firm maintains a very large database of top candidates who are interested in new, challenging positions. The strengths and administrative skills of these potential candidates have been analyzed by the firm. It is important, however, for our clients to know that we are not a placement service that owes any favors to potential candidates, and that we actively recruit women and minority candidates. Our professional objective is to recruit and advertise for the best candidate that meets the qualifications and characteristics of a superintendent as set forth by the board. Our recruitment process is very comprehensive, here highlighted by the following steps:

- Inform all of the firm's associates of the position including profile information.
- Advertise in effective media known for high readership by school leaders.
- Consult our extensive database for precise matches between district and candidate profiles.
- Contact directly successful school leaders who are in good positions currently for them to consider the Seattle Public Schools.
- Contact other organizations at state, regional and national levels regarding the position.
- Actively seek out potential candidates at state and national conventions.

Once recruited, all applicants are screened from the perspective of viable match with district criteria. Those who emerge successfully from this screening are termed true candidates and our background research team then conducts extensive investigations on those individuals. The best of those candidates become top candidates and for each of them a candidate packet and one way video interview is produced for the board's review. All materials will be shared with the Board. The firm will select the top candidates to move forward with the Board members input.

We have been highly successful in placing outstanding candidates in all of our searches for over forty-two years. We organize the interview process and offer an objective method for determining the board's top candidate by consensus. At this point we begin the negotiations to finalize a mutually agreeable contract.



## 4. Company Profile and Qualifications of Team Members

### HISTORY AND OVERVIEW OF THE ORGANIZATION

#### PROFILE OF THE FIRM

Ray and Associates, Inc. (319-393-3115; [glr@rayassoc.com](mailto:glr@rayassoc.com)) is a professional organization that specializes in school executive leadership searches. **The firm has been in the school executive search business since 1975** and has established an outstanding reputation. The firm has been recognized by *The School Administrator* journal as one of the top search firms in the country. Our professional consultants, including women and minorities, are persons with long-term experience in the school executive search field, with extensive backgrounds as school administrators, business executives, school board members, university professors and attorneys. All of the consultants within the firm have years of experience in the school executive search field.

Ray and Associates, Inc. is an independent and objective firm that does not accept placement fees from any candidate. We have designed a highly effective procedure that allows us to impartially assist schools in selecting the best individual for their particular needs.

In addition to our corporate office (**located at 4403 1<sup>st</sup> Ave SE Suite 407, Cedar Rapids, Iowa 52402**) **we have a national executive director, corporate director, six regional directors and over one hundred seventy (170) associates located throughout the country.** Therefore, distance is not a factor to our firm when meeting with our clients.

The corporate office also maintains a full-time administrative staff to assist in the executive search business.

Our firm has exhibited at the National School Boards Association (NSBA), National Association of Secondary School Principals (NASSP), the American Association of School Administrators (AASA), the Association of Latino Administrators and Superintendents (ALAS) and the National Alliance of Black School Educators (NABSE), as well as other professional organizations, for over forty-two (42) years. Exhibiting and presenting at these state and national organizations allows the firm to meet and recruit outstanding administrators for our clients. We also have associates who are affiliated with the Council of Great City Schools (COGCS), Urban Superintendents Association of America (UBAA), the Association of Latino Administrators and Superintendents (ALAS), National Alliance of Black School Educators (NABSE), as well as other professional organizations. Exhibiting at state and national conventions allows the firm to meet and recruit outstanding administrators for our client districts. As a result, Ray and Associates has access to the most comprehensive pool of candidates of any executive search firm in the country.

It is only a matter of reality that outstanding administrators already have good jobs and need to be recruited. We are familiar with Seattle as we have conducted several successful searches for Seattle Public Schools. We are familiar with Washington as we recently completed the successful Superintendent searches for Mercer Island School District, Bellevue School District and Northshore School District and previously assisted Kent School District, Port Angeles School District, Tacoma Public Schools, Ferndale School District and Federal Way Public Schools, Washington with their Superintendent searches. In the Western region, we have conducted searches for Juneau City School District and Anchorage School District, Alaska; Poway Unified School District, San Ysidro School District, Albany USD, Berkeley USD, Pasadena USD and Emery USD, California; Blaine County School District, Idaho; Albuquerque Public Schools, Los Alamos Public Schools and Santa Fe Public Schools, New Mexico; Hawaii School of Deaf and Blind, Hawaii; Roosevelt Elementary School District, Deer Valley Unified School District and Gilbert Public Schools, Arizona; Gresham-Barlow School District, Salem-Keizer Public Schools, Lake Oswego School District, Eugene School District 4J, Hood River County School District and Medford School District 549C, Oregon; and Jeffco Public Schools, Flagstaff Academy and Eagle County Schools, Colorado. Our network and recruiting efforts are second to none. We bring a wealth of experience and knowledge to your District focused upon our goal to make the selection process professional, efficient and successful so we can state, without reservation, that you will be quite pleased with our services.

#### 4. Company Profile and Qualifications of Team Members -Continued

##### **KEY ASSOCIATES FOR THE PROJECT**

The following principal/project coordinators will be actively involved in working with the school district. The associates listed below will be assisting in recruitment, screening and background checks. The firm chooses various associates across the country to be sure that every region will be covered to recruit the best candidates for the Seattle Public Schools. In addition, we have professional contacts throughout Washington, the Northwestern region and nationally. The following is only a partial list of associates who will be involved in the recruitment and screening of candidates. The firm will actually involve many more associates for the project.

##### **Mr. Gary L. Ray, Chairman**

Principal/Project Coordinator/Cedar Rapids, IA

Gary is Chairman of Ray and Associates, Inc. He supervises and oversees all searches conducted by the firm and will directly interact with the Seattle Public Schools and any committee that may be established on all details of this search. Mr. Ray is a former school administrator with an advanced degree who has worked with hundreds of school boards for over forty-two (42) years.

##### **Mr. Ryan M. Ray, President**

President/St. Louis, MO

Ryan is President of Ray and Associates, Inc. He oversees and assists with all aspects of our executive searches. He also assigns all background investigative work on candidates and supervises the teams work. He has an earned Master's degree from Lindenwood University in St. Louis and a Bachelor's degree from the University of Missouri in Columbia, Missouri.

##### **Dr. Tony Apostle**

Regional Search Director/Fox Island, WA

Tony serves our firm as a Regional Search Director and will monitor and direct search team efforts as well as recruiting and screening candidates. Mr. Apostle graduated from the University of Washington with a Bachelor's degree in English/Political Science and from Washington State University he earned a Master's degree in Educational Administration and a Doctorate degree in Elementary/Secondary Education. Tony has served as an educator in Washington for over 30+ years serving as an English Teacher, Principal, Director and Superintendent.

##### **Dr. Paige Fenton Hughes**

Regional Search Associate/Douglas, WY

Paige serves our firm as a Regional Search Associate, team member, and background investigator and as such performs recruiting and screening of candidates. She earned her doctorate in Educational Administration from the University of South Dakota. She has over twenty years of experience in education having served as a Coach, Teacher, Guidance Counselor, Principal, and Superintendent in South Dakota, Montana, and Wyoming.

##### **Dr. Gloria Davis**

Regional Search Associate/Chicago, IL

Gloria serves our firm as a Regional Search Associate, team member, and background investigator and as such performs recruiting and screening of candidates. She earned her doctorate in Educational Administration from St. Louis University. She has over forty-six years of experience in education having served as a Chairperson, Teacher, Principal, and Superintendent in Illinois.

## ***VITA FOR***

### **GARY L. RAY**

#### **President, Ray and Associates, Inc.**

Executive Plaza Building  
4403 1st Avenue S.E., Suite 407  
Cedar Rapids, Iowa 52402-3221  
319/393-3115 (Work)

### **EDUCATIONAL BACKGROUND**

<b><u>Degree</u></b>	<b><u>University</u></b>	<b><u>Date</u></b>	<b><u>Field of Study</u></b>
Ed.S.	Iowa State University Ames, Iowa	1972	School Administration
M.A.E.d.	Northeast Missouri State University Kirksville, Missouri	1970	School Administration
B.S.E.	Northeast Missouri State University Kirksville, Missouri	1969	Health and Physical Education/English

### **PROFESSIONAL TRAINING**

A frequent presenter at various national and state conventions. Some of the topics presented have been as follows:

- ◆ Shortage of School Administrators
- ◆ Confronting School Crime and Violence
- ◆ School District Assessment
- ◆ Effective Hiring Practices
- ◆ Strategic Planning
- ◆ Recruiting, Selecting and Retaining Excellent Teachers
- ◆ Infusing Technology in Schools
- ◆ Board and Administrative Roles and Responsibilities
- ◆ A Simplified Approach to ADA Compliance
- ◆ Professional Advancement
- ◆ Enhancing School Climate by Shared Decision Making

- ◆ Dealing with Special Interest Groups
- ◆ Staff Motivation
- ◆ Improving Staff Morale
- ◆ Evaluating and Improving Administrative Performance
- ◆ Developing the Administrator Compensation Package
- ◆ The New Administrator's Workshop
- ◆ Building Public Support for Your Schools
- ◆ Professional Growth and Advancement

Distinguished Faculty Member, Broad Urban Superintendents Academy; to participate in the mentoring program for Urban Superintendents.

Has exhibited at the National School Boards Association and American Association of School Administrators for over twenty-seven years.

Has exhibited in the following states: Arizona, Florida, Illinois, Iowa, Missouri, Texas and Washington.

Published in American Association of School Administrators — Critical Issues Report, "Collective Bargaining Problems and Solutions."

### **PROFESSIONAL EXPERIENCE**

1975 - Present	President of Ray and Associates, Inc., a national firm that specializes in human resource services, labor relations, and executive searches for school districts, cities, counties and private sector.
1973 - 1976	High School principal — Linn Mar Community School District, Marion, Iowa.
1972 - 1973	High School and Middle School principal — Colo Community School District, Colo, Iowa.
1972 - 1973	English Teacher — Lenox Community School District, Lenox, Iowa.

# **Ryan M. Ray**

**6920 Pershing Avenue, St. Louis, MO 63130**

*Tel: 314-495-8114    [ryanray20@me.com](mailto:ryanray20@me.com)*

## **EDUCATION**

**Master's Degree in Human Resources Management with emphasis in Business** **2005**  
Lindenwood University, Saint Charles, Missouri

**Bachelor's Degree in Business and Communications** **2001**  
University of Missouri at Columbia, Columbia, Missouri

## **EXPERIENCE**

- President, Ray & Associates Inc., Cedar Rapids, Iowa** **2005-Present**
- Integral leader of teams whose mission is to recruit superintendents and top executive administrative positions for school boards across the United States
  - Leader of website production and all media related projects for Ray and Associates including a new website launched in the fall of 2015
  - Direct engagement teams, and supervise up to twenty-three search associates per engagement
  - Prepare confidential materials of search candidates to present to boards of education
  - Train and mentor 170 associates in recruitment of candidates and policies
  - Work with diverse social /economic backgrounds within school districts and boards of education
  - Develop company brochures for promotion as well as for schools seeking superintendent hires
  - Participation as an exhibitor and presenter in national conventions, (AASA-American Association of School Administrators, NSBA-National School Boards Association)

## **KEY ACCOMPLISHMENTS**

- Representation at mediation, fact-finding and impasse arbitration
- Team successfully placed 7 superintendents in recent years, for urban districts having large budgets
- List of recent placements:
  - Superintendent, DeKalb County School System, GA  
District Budget: \$1.45 Billion
  - Superintendent, Brevard County Public Schools, FL.  
District Budget: \$910.75 Million
  - Chief Executive Officer, Prince George's County Public Schools, MD  
District Budget: \$1,376,818,700
  - Superintendent/CEO, Charlotte Mecklenburg Schools, NC  
District Budget: \$1.2 Billion
  - Chief Financial Officer, Pittsburgh Public School District, PA  
District Budget: \$531.4 Million
  - Superintendent, Ladue School District, MO  
District Budget: \$43.5 Million
  - Superintendent, Lee's Summit R-7 School District, MO  
District Budget: \$181 Million

- Human Resources Manager of Three Stores, Target Corporation, St. Louis, Missouri** **2002-2005**
- Attended Target Business School
  - Oversaw opening, remodeling and closing of three stores

- Responsible for over 100 employees

**Human Resources Associate, Ray and Associates, Cedar Rapids, Iowa**

**1997-2001**

- Telephonic interviewing of potential candidates for Superintendent/C.E.O. positions
- Recruited potential candidates nationally
- Referral follow-up and interviews
- Attended national conventions

**Recruiter (Internship), McLeod USA, Cedar Rapids, Iowa**

**1998**

- Scheduled and conducted interviews
- Hired employees in Sales/ Technology/ Management
- Referral follow-up
- Planned and scheduled job fairs on college campuses
- Organized meetings with potential clients

## **SKILLS**

- Outstanding presenter and trainer
- Computer skills include: MS Windows and Apple Macintosh platforms. Proficient skills in MS Word, MS Excel, Word Perfect, MS Publisher, MS Excel, MS Power Point, People Soft Training, Adobe Acrobat, Adobe Image Maker, Adobe Photoshop, Final Cut Pro, Motion, Logic, Soundtrack Pro, DVD Studio, Shake, Xsan, Keynote, Pages, Garage-band, File-maker, iwork, ilife, Bento.
- Skilled with internet navigation, research, data collection and e-mail applications
- Behavioral Based Interviewing
- Languages spoken: English first language and advanced knowledge of Spanish, oral and written.

## **AFFILIATIONS**

- SHRM, Society for Human Resources Management
- American Association of School Administrators
- National School Boards Association
- National Alliance of Black School Educators
- Association of Latino Administrators and Superintendents
- ArtLink Board Member and Technology Advisor, Saint Louis – 2007-2010
- University of Missouri Football Team, Player -1998-2001
- Big XII Football Conference University of Missouri, Two Time All Academic Team
- Boy Scouts of America, Eagle Scout

**TONY APOSTLE**  
**1079 13<sup>th</sup> Lane**  
**Fox Island, Washington 98333**  
**Cell: 253.686.4665**  
**andoniosapostle@comcast.net**

<b>EDUCATION</b>	<b>Ed. D ELEMENTARY/SECONDARY EDUCATION</b>	1989
	Washington State University Pullman, WA	
	<b>M.A. EDUCATIONAL ADMINISTRATION</b>	1979
	Washington State University Pullman, WA	
	<b>B.A. ENGLISH (major), Political Science (minor)</b>	1974
	University of Washington Seattle, WA	
	<b>HIGH SCHOOL DIPLOMA</b>	1969
	Woodrow Wilson High School Tacoma, WA	
<b>DISTRICT ADMINISTRATION EXPERIENCE</b>	<b>INTERIM SUPERINTENDENT</b>	Nov. 2016 – Feb. 2017
	Poway Unified School District: Enrollment 36,000 San Diego, CA	
	<b>INTERIM SUPERINTENDENT</b>	Nov. 2014 – June 2015
	Kent School District: Enrollment 28,000, Kent, WA	
	<b>SUPERINTENDENT</b>	2004 - 2012
	Puyallup School District: Enrollment 21,700 Puyallup, WA	
	<b>EXECUTIVE DIRECTOR OF ADMINISTRATIVE SERVICES</b>	2002 - 2004
	Puyallup School District: Enrollment 20,450 Puyallup, WA	
	<b>DIRECTOR OF ADMINISTRATIVE SERVICES</b>	1997 - 2002
	Puyallup School District: Enrollment 19,000 Puyallup, WA	
	<b>DIRECTOR OF ELEMENTARY EDUCATION</b>	1995 - 1996
	Puyallup School District: Enrollment 17,193 Puyallup, WA	
	<b>ASSISTANT TO THE SUPERINTENDENT</b>	1990 - 1995
	Puyallup School District: Enrollment 16,800 Puyallup, WA	
<b>BUILDING ADMINISTRATION EXPERIENCE</b>	<b>HIGH SCHOOL PRINCIPAL</b>	1984 - 1990
	Central Kitsap High School: Enrollment 1,400, grades 9-12 Central Kitsap School District: Enrollment 12,500 Silverdale, WA	
	<b>HIGH SCHOOL ASSISTANT PRINCIPAL</b>	1982 - 1984
	Centralia High School : Enrollment 1,150 Centralia School District: Enrollment 3,200 Centralia, WA	
	<b>JUNIOR HIGH / HIGH SCHOOL PRINCIPAL</b>	1979 - 1981
	Kittitas Junior/Senior High School: Enrollment 200 (grades 7-12) Kittitas School District: Enrollment 510 Kittitas, WA	
<b>HIGH SCHOOL CLASSROOM TEACHING EXPERIENCE</b>	<b>ENGLISH TEACHER</b>	1974-1979
	Lakes High School/Clover Park High School, Clover Park School District, Lakewood, WA	



<b>PROFESSIONAL CREDENTIALS</b>	<b>CONTINUING SUPERINTENDENT CREDENTIAL</b>	2011
	<b>INITIAL SUPERINTENDENT CREDENTIAL</b> Washington State University Pullman, WA	1993
	<b>CONTINUING SECONDARY PRINCIPAL CREDENTIAL</b> Washington State University, Pullman, WA	1979
	<b>STANDARD TEACHER CREDENTIAL</b> , University of Washington	1979

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### **Professional Memberships:**

- Former King/Pierce County Superintendents Committee Co-Chair, 2010-2011
- Former Member, King/Pierce County ESD Superintendent's Advisory Committee
- Member, "Big W" University of Washington Athletic Letter Club - Football
- Current Member, Washington Association of School Administrators  
Leadership responsibilities: Professional Ethics and Membership
- Current Member, American Association of School Administrators

### **Civic Activities and Recognitions:**

- Tacoma Branch NAACP Lifetime Achievement Award, August 2014
- Tacoma Urban League, Black Collective, Elizabeth Wesley Youth Merit Program  
Lifetime Achievement Drum Major Award for the leadership support to promote student achievement for African-American students. September 2010
- 1998 Zeiger Award, Outstanding Educator Award, Puyallup School District
- 1988 Golden Acorn PTA Award, Central Kitsap High School
- Former Board Member, SAFE Streets of Pierce County
- Former Member, Kids First of Puyallup
- Former Member, Tobacco-Free Puyallup
- Former Board Member, Puyallup YMCA
- Awarded a 4-year NCAA Division I Football Scholarship at the  
University of Washington, 1969 – 1972

### **Other Educational Consultant Experiences:**

- Ontario – Montclair School District, Ontario, CA
- Olympia School District, Olympia, WA
- Ray and Associates, Inc. Cedar Rapids, IA



# Paige Fenton Hughes, Ed.D.

912 Big Horn, Douglas, WY 82633 | Phone: 307.349.4506 | [paige.fentonhughes@gmail.com](mailto:paige.fentonhughes@gmail.com)

## PROFESSIONAL PROFILE

- Executive-level educator experienced in increasing the capacity of teams and systems
- Accomplished leader of continuous improvement efforts
- Lead learner and reflective practitioner who instills the desire for learning in others
- Networker who is continually building relationships with legislators, state officials, and school and community entities
- Expert in all facets of systems leadership including budgeting, facilities, support services, curriculum and assessment, and teaching and learning

## PROFESSIONAL AFFILIATIONS

- Wyoming and American Associations of School Administrators
- NASBE Science Standards Advisory Group
- AdvancED Wyoming State Council
- Lights On Lander Advisory Council
- Wyoming Public Radio Advisory Group
- WY School-University Partnership, past chair
- ASCD
- Wyoming Instructional Facilitator Task Force
- Lander Valley Education Foundation Board of Directors
- Lander-Riverton Business Leadership Network Advisory Board
- South Dakota State Advisory Councils on Highly Qualified Teachers, Elementary Teacher Preparation and Superintendent Certification

## EDUCATION

Ed.D., Educational Administration,  
University of South Dakota, Vermillion,  
SD

School Superintendent Endorsement,  
Chadron State College, Chadron, NE

Principal's Endorsement, University of  
Montana, Missoula, MT

M.Ed., School Counseling, Montana  
State University-Billings, Billings, MT

BA, Cum Laude, English/History-  
Political Science, Rocky Mountain  
College, Billings, MT

## EXECUTIVE EDUCATIONAL LEADER

[www.fentonhughesconsulting.com](http://www.fentonhughesconsulting.com)

## PROFESSIONAL EXPERIENCE

### Converse County School District #1, Douglas, WY, 2016-present

- Superintendent
  - Providing support and guidance to a nine-member board of education serving seven Wyoming communities, 400 employees, and 1650 students in five community schools and five rural schools
  - Leading the district through comprehensive continuous improvement processes aimed at increasing operational effectiveness and enhancing student performance
- Assistant Superintendent
  - Served for one transition year as assistant superintendent in charge of curriculum, instruction, and assessment

### Independent Consultant, 2010-Present

- Consultant
  - Offering comprehensive consulting services to school districts; serving as a lead evaluator for AdvancED district accreditation teams; teaching graduate courses in educational leadership, University of Wyoming; working on executive educational leader searches.

### Wyoming State Board of Education/Department of Education, Cheyenne, Wyoming, 2010-2016

- Coordinator for the Wyoming State Board of Education
  - Provided executive direction to the Board in completing tasks associated with statewide education accountability and other board responsibilities; prepared information for and testified at legislative meetings; collaborated with legislators, governor's office and professional education groups to craft common-sense statewide education policy
- District Coach
  - Coached school district senior leadership teams and worked with local school boards to implement the systems approach to continuous improvement; provided oversight of and input on school improvement processes for transformation and turnaround; and mentored new superintendents

### Superintendent, Fremont County School District #1, Lander, Wyoming 2005 to 2010

- Spearheaded a vision-building and goal-setting process leading to the development of a strategic plan that guided all district work in a district with 1700 students, 350 employees, and eight schools
- Designed and implemented a comprehensive and sustainable professional development program aligned to the district strategic plan
- Redesigned the personnel and data collection processes in the district
- Planned and designed two new LEED certified schools with the School Facilities Commission

### Superintendent/7-12 Principal, Harding County Schools, Buffalo, SD, 2003-2005

- Designed comprehensive professional development plan meshed with the district's vision and goals
- Built a balanced budget, redesigned a sustainable staffing plan, and authorized all state reports

## TESTIMONIALS

“Paige is keenly aware of how to use data to focus on doing the “right work”. Undoubtedly, she has the skills and ability to enter a new organization, analyze the data and create a plan to move the system forward.”

—District administrator

“The respect she has with the entire staff is very well deserved. She has earned it through strong leadership and fairness.”

—School board chair

“I have never met anyone as driven, as principled and grounded in one’s beliefs and as passionate about education as [Paige] is.”

—School board member

“Paige brings an energy and enthusiasm to the position of administrator that is unequaled... She knows systems can improve and serve students more fully and won’t compromise on that vision”

—District administrator

“When faced with adversity or discontent, you can count on [Paige] to be a person of integrity that follows through and delivers. She makes... decisions from a position of common sense, of what is right and from a place of deep caring about people.”

—Education consultant

“You are out there... staff know who you are, and I think they feel they could come talk to you if they needed to.”—School board member

“[An] outstanding quality Paige possesses is her ability to implement structural changes that improve communication and resulting performance.” —School board chair

## AREAS OF EXPERTISE

- Continuous organizational improvement
- Strategic planning
- Systems leadership and training
- Process and performance management
- Growing leadership capacity
- Coaching for growth
- Using data to inform decision-making and problem-solving processes
- Modeling continuous learning
- Advocating for diverse student populations
- Developing accountability systems
- Managing time and resources most effectively
- Creative and innovative program management
- Using and modeling 21<sup>st</sup> century skills

## K-12 Principal/Activities Director, Harding County Schools, Buffalo, SD, 2001-2003

- Initiated a school improvement process and guided the committee through the first three phases
- Designed and implemented parallel block schedule for the elementary school
- Planned a new supervision and evaluation system for staff based on the differentiated supervision model
- Designed and implemented a modified block schedule for the junior and senior high schools
- Built an evaluation tool for coaches, wrote a coaches’ handbook, began a sportsmanship awareness program involving students, coaches and parents

## High School Guidance Counselor

Red Lodge High School, Red Lodge, Montana 2000-2001

Belle Fourche High School, Belle Fourche, South Dakota 1996-2000

- Offered comprehensive guidance and counseling services to students

## English/Social Science Teacher and Coach

Dawson County High School, Glendive, Montana 1993-1996

Carter County and Ekalaka Public Schools, Ekalaka, Montana 1991-1993

- Taught high school English, junior high social studies, and coached sports

## Presentations

- New Science Standards: A Readiness Assessment for State Policymakers, National Association of State Boards of Education Webinar and Workshop, 2015
- AdvancED Lead Evaluator Presentations, Wyoming School Improvement Conferences, Casper and Cheyenne, WY--2013, 2014, 2015
- Got a Plan—or 3 Plans? and Does Your Plan Drive Your Work?, School Improvement Conference, Casper, WY, 2012
- Strategic Planning: The Key To Systems Improvement and Operations Staff Supporting Student Growth: How To Bring Classified Staff Into the Improvement Fold, TIE Conference, Rapid City, SD, 2011
- You Assess How? Formative Assessment—Getting Results You Want —School Improvement Conference, Cheyenne, WY, 2010
- Leadership Lessons from My Practice—Wyoming Game and Fish Department Leadership Training Cohort, Lander, WY, 2010
- Organizational Assessment Panel (with Wyoming Department of Education) and Putting the Puzzle Together (with Pam Lange of TIE)—School Improvement Conference, Cheyenne, WY, 2009
- Upgrading Your Curriculum Using Exemplars and Using Technology to Upgrade Mapping--Curriculum Mapping Institute, Park City, UT 2009
- Excellence Initiative—An Overt and Unapologetic Commitment to Excellence, AdvancEd Conference, Chicago, IL, 2009
- Mapping a Path to Curriculum Mapping—School Improvement Conference, Casper, WY, 2009
- Using Technology Resources to Support Professional Development—School Improvement Conference, Cheyenne, WY, 2008
- Creating Schools Where Everyone Belongs and Everyone Excels—Joint Education Interim Committee/Select Committee on Tribal Relations, Riverton, WY, 2008
- Leading Curriculum Mapping with Podcasts, Vodcasts, Wikis, Blogs and More and Bringing New Teachers Into the Curriculum Mapping Fold—Curriculum Mapping Institute, Park City, UT, 2008
- Artifact Analysis: Bringing Unseen Practices to Light and Engaging All Students in Learning: Our Primary Purpose —School Improvement Conference, Casper, WY, 2007
- Presentation to the Legislative Select Committee on Charter Schools, Lander, WY

**Gloria J. Davis**  
**Retired Superintendent of Schools**

**Address:**

**1160 South Michigan Ave. Unit 4303**

**Chicago Illinois 60605**

**[Gjdavis1@comcast.net](mailto:Gjdavis1@comcast.net)**

**312-929-2069**

**217-413-1960 Cell**

**Education:**

**Doctoral Program – St. Louis University, St. Louis MO**

**Completed All Course Requirement for Doctorate in Education Degree – 2005**

**Washington University, St. Louis MO**

**Master of Arts Degree, Educational Administration – 1978**

**Southern Illinois University, Edwardsville, IL**

**Bachelor of Science Degree, Elementary Education - 1971**

Ms. Gloria J. Davis has an extensive background in education. Her professional career expands over 46 years in the field of education, especially in the areas of administrative experience. She has endeavored to promote the philosophy that all children can and will learn regardless of their circumstances when given the ingredients of high expectations, care and the adult belief that they are capable of achieving success. This personal philosophy has been the basis of her leadership focus throughout her career.

Currently, Ms. Davis is retired as the Superintendent of Schools from the Illinois Department of Juvenile Justice and Decatur Public Schools, Decatur IL. After retiring from Decatur Public Schools as Superintendent in 2014, she was encouraged to continue her quest to serve young people and she began this new position in August 2014.

She was responsible for the education of youth in School District #428 of the Department of Juvenile Justice where she provided the leadership for education in all six Juvenile Justice Centers throughout the State of Illinois.

The School District is currently under a Federal Consent Decree, which began in 2010 to improve the educational structure and academic, social and emotional outcomes of all the youth in the Juvenile Centers. Within her first year and a half she was able to provide a clear process for district procedures, academic outcomes and education reform. Under Ms. Davis leadership the district has been able to increase staff; provide a much more coherent instructional approach through a concept of “Blended Learning”; and greatly increase the use of meaningful classroom materials through focused professional development and improved technology.

Over the past thirteen years, Ms. Davis has also served as Superintendent in two other Districts. The first was Superintendent of Schools in Dodge City, Kansas from 2001 to 2006. While there, she provided the leadership for a complete restructuring of the district that resulted in increased academic achievement for all students, especially for the 72% Hispanic/Latino population. The District was able to improve academic achievement at a dramatic rate. She reconstructed the central office and established professional learning communities in all the schools and established After School Programs and summer school.

The second district where she served as Superintendent of Schools for eight years was in Decatur, Illinois from 2006 to 2014. While there as the district leader, she provided the vision for totally changing the academic framework of the school system by making tough decisions that put students first. This was accomplished through the development of a Strategic Plan that was truly a “working document” that was constantly reviewed and discussed in order to produce increased academic success led to increased Advanced Placement Classes (from three to fourteen) and doubling the number of Honor Classes.

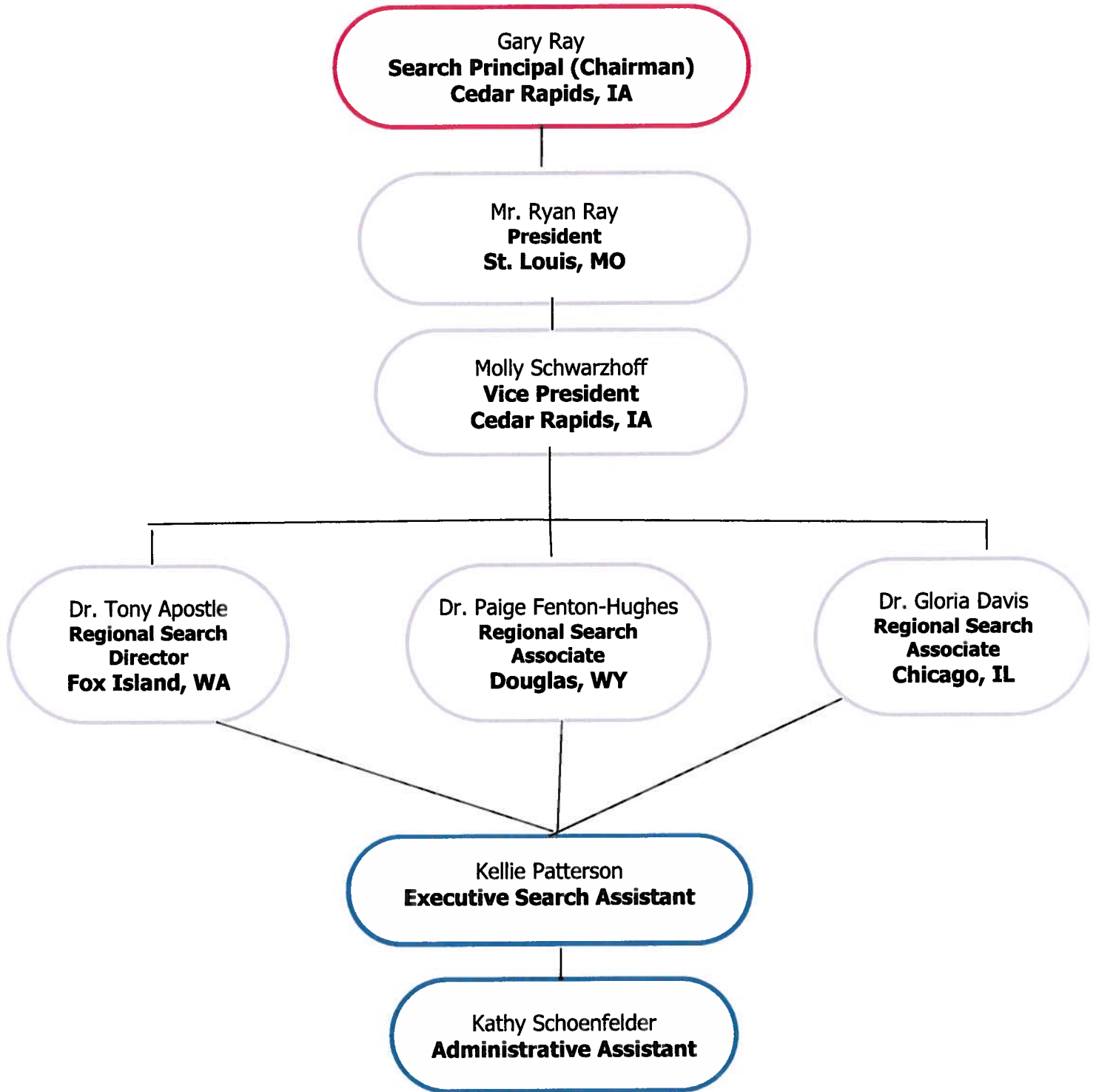
In addition, during her tenure as Superintendent in Decatur, thirteen of the seventeen elementary schools in the district received awards from the State of Illinois based on their Superior Achievement results with students from very diverse populations and low socio-economic backgrounds. As a result of her many efforts in the Decatur, Illinois community, a community-wide Education Coalition was continually established that included over 150 community and business leaders to provide human and financial support for the district. In addition, a 1% Sales Tax Referendum was passed in November 2010, in spite of a tough economic climate that fully engaged the entire community. This referendum was used for the renovation of both high schools, turning them into state-of-the-art facilities. All of the students have utilized one to one technology with new Apple Mac Book laptops as one of the major outcomes of the renovation project.

Ms. Davis possesses a wide range of experience as a district and building leader. She has served in elementary and secondary education as a teacher, elementary and middle School Principal and Assistant Superintendent of Curriculum and Instruction in University City, Missouri from 1971 – 2001.

Ms. Davis educational background includes a Bachelor of Science Degree in Elementary Education from Southern Illinois University, Edwardsville, Illinois; Master of Arts Degree from Washington University, Saint Louis, Missouri and completion of all required courses for the Doctoral Program from Saint Louis University, Saint Louis, Missouri. She is an active member of each community she has lived in, joining numerous civic and education organizations.

Ms. Davis was recently elected as the Chairperson of the Superintendent Commission of the National Alliance of Black School Educators (NABSE) and the NABSE Leadership Summit. In addition, she has been appointed to the Illinois Advisory Board for Advancing Wellness and Resilience in Education (IL-AWARE) and the Illinois State Advisory Council on the Education of Children with Disabilities (ISAC). Both of these board appointments are through the Illinois State Board of Education (ISBE). Her professional and community organizations include but are not limited to: The American Association of School Administrators; National Superintendent's Roundtable; and Delta Sigma Theta Sorority.

Company Profile and Qualifications of team Members -Continued



## 5. Awareness and Understanding of Seattle and Seattle Public Schools

We are familiar with Seattle as we have conducted several successful searches for Seattle Public Schools. We are familiar with Washington as we recently completed the successful Superintendent searches for Mercer Island School District, Bellevue School District and Northshore School District and previously assisted Kent School District, Port Angeles School District, Tacoma Public Schools, Ferndale School District and Federal Way Public Schools, Washington with their Superintendent searches. In the Western region, we have conducted searches for Juneau City School District and Anchorage School District, Alaska; Poway Unified School District, San Ysidro School District, Albany USD, Berkeley USD, Pasadena USD and Emery USD, California; Blaine County School District, Idaho; Albuquerque Public Schools, Los Alamos Public Schools and Santa Fe Public Schools, New Mexico; Hawaii School of Deaf and Blind, Hawaii; Roosevelt Elementary School District, Deer Valley Unified School District and Gilbert Public Schools, Arizona; Gresham-Barlow School District, Salem-Keizer Public Schools, Lake Oswego School District, Eugene School District 4J, Hood River County School District and Medford School District 549C, Oregon; and Jeffco Public Schools, Flagstaff Academy and Eagle County Schools, Colorado.

We are familiar with the Pacific Northwest having worked with numerous districts in similar size and diversity around the country. Ray and Associates, Inc. has done several searches for districts that are members of the Council of the Great City Schools. We understand the unique characteristics, culture, and opportunities of Seattle and the District having several associates who have previously worked in the surrounding areas. Several of our associates have been in the same Educational Service District for over 20 years in Washington and we have personally worked with the past superintendents/interim superintendents. We have a good understanding of Seattle and know that Seattle Public Schools have extremely strong teacher and principal associations and need a strong leader to bring the community, staff and students together much like John Stanford who was very visible in the community and connected major media outlets with the schools. We understand the School Board approved and is in the process of continuing your current Strategic Plan “Every Student. Every Classroom. Every Day.” And will be looking for your new Superintendent to help create the next Strategic Plan. It is important for the new Superintendent in an urban district to have political skills in order to build relationships within the city government.

We are aware of the increasing student population as well as the projected metropolitan area which will have a big impact on the schools and facilities. We realize that with the large and diverse student population that over 121 different languages and dialects are spoken by the students.

Seattle will need a Superintendent who understands equity and diverse population and the challenges of student achievement in an urban district.



## 5. Project Approach

### **CONSULTANT SERVICES PROVIDED FOR THE SEATTLE PUBLIC SCHOOLS THE CONSULTANT WILL:**

#### **STAGE 1 - BOARD INPUT AND PREPARATION**

1. Customize the search process to meet the needs and expectations of the Seattle Public Schools.
2. Conduct individual Board member interviews to assess the Board's priorities, goals and objectives to aid in the development of the criteria and qualifications for the Superintendent position.
3. Work with the Board to establish a timeline that lists each step in the search process.
4. Discuss with the Board the requirements and salary range for the Superintendent position.
5. Work with the Seattle Public Schools staff and those selected by the Board in the development of an accurate informational flyer and online application form. If desired, our office staff has the experience and capability to create the District's promotional flyer.

#### **STAGE 2 - PROFILE DEVELOPMENT AND PROCESS**

6. If desired, provide a proven consensus building mechanism for obtaining input from various constituencies, staff members, other stakeholders and the Board. In addition, our firm has the resources to offer an online survey option in many languages at no additional fee. We will provide a link to the survey to post on the District's website. The consultants will receive and organize all input data and then report the results to the Board.
7. Provide the Board with cost saving options to minimize expenses by utilizing Skype, conference calls or gotomeetings to reduce paper copies, travel expenses and shipping costs.
8. Develop all required forms for the application and screening process.

#### **STAGE 3 - RECRUITING AND SCREENING**

9. Conduct all aspects of the recruitment process on a statewide, regional and national basis as follows:
  - Notify all associates to actively recruit potential candidates.
  - Contact individuals in our firm's database whose interests match District criteria.
  - Actively recruit applications from qualified individuals.
  - Solicit nominations from knowledgeable people in the profession.
  - Contact other professional consultants in private and public sectors.
  - Discuss with all candidates the District's characteristics and the Board of Education's profile and criteria for the new Superintendent position.
  - Advertise nationally in the following as selected by the Board: AASA Website, Education Week Newspaper and Website, Ray and Associates Website, the Washington School Administrators and Washington School Boards Publications, Hispanic Outlook, The School Administrator Publication, Executives Only Website, the Association of Latino Administrators and Superintendents (ALAS), National Alliance of Black School Educators (NABSE) and other publications selected by the Board.



## 6. Project Approach - Continued

### STAGE 3 - RECRUITING AND SCREENING – CONTINUED

10. Develop and manage the candidate screening process. All applicants are screened from the perspective of a viable match with district criteria to determine their capabilities, strengths and weaknesses. The search team thoroughly reviews each file and seeks alignment of qualifications with District expectations. Those who emerge successfully from this screening are deemed viable candidates.
11. Check references provided and conduct additional background investigation of top candidates. Our firm interviews each viable candidate that meets Board criteria and verifies their qualifications and experience. Our background research team then conducts extensive investigations on those individuals. The investigations go well beyond listed references and their current position. A complete check of a candidate's work history is also completed utilizing online resources such as Google, Yahoo, Facebook, Twitter and other social media sources as well as checking for blogs.

### STAGE 4 - CANDIDATE PRESENTATION

12. Provide the Board with an opportunity to observe each top candidate interviewed with questions specifically designed by Ray and Associates, Inc. through video technology. This will allow Board members to get a better perspective of each candidate in order to determine which candidates to interview. Ray and Associates was the first search firm to provide this video technology screening of candidates. By offering this opportunity, this will save the Board members on expenses and their time.
13. Provide an impartial and objective consensus building matrix instrument developed by Ray and Associates to assist the Board in determining the finalists for an interview. We have been extremely effective working with Boards who are divided on issues and candidates.
14. Assist the Board in establishing the interview format and in developing interview questions.
15. Determine and coordinate constituent and staff involvement in the interview process, if desired by the Board.
16. Help arrange the details of interviews for leading candidates.
17. Provide the Board with *professional* criminal, civil litigation, social security, motor vehicle record checks and verification of educational degrees for the top (2-3) candidates at no additional fee.
18. Coordinate with the Seattle Public Schools Business Office the procedure for reimbursement of candidates' expenses.

### STAGE 5 - SELECTION OF FINALIST AND FUTURE PLANNING

19. Assist District legal staff in negotiating the contract with the successful candidate at no additional cost to the District.
20. After the appointment, dispose of the files and send appropriate communications to the candidates not interviewed by the Board.
21. If desired, assist the District in preparing a press release, upon request, announcing the appointment of the new Superintendent.
22. Provide the Board with a report of the Board Self-Assessment Survey Results at no additional cost.

The Superintendent search services and process listed above and shown on the following page can be adjusted to meet the specific needs of the Seattle Public Schools.

## 6. Project Approach - Continued

### SEATTLE PUBLIC SCHOOLS SUPERINTENDENT SEARCH *SUGGESTED* PROCESS AND TIMELINE

*Items highlighted in yellow indicate an in-person meeting with the consultant(s)*

<u>DATE</u>	
Stage 1 Board Input & Preparation	<u>11/28/2017</u> Consultant planning meeting with the Board and individual Board member interviews. (Time: <i>TBD</i> ) (option to conduct via Skype, conference call or gotomeetings.com)
	<u>11/29/2017</u> Begin preparing information for the district promotional flyer and online application form with the District liaison representative(s).
	<u>11/29/2017</u> Notify all associates and other professional contacts of vacancy.
	<u>12/04/2017</u> Contact constituents and stakeholders for input meetings on <u>01/09-10/18</u> .
Stage 2 Profile Development & Process	<u>12/05/2017</u> Online survey link, for input on developing the profile, available on District website from <u>12/05/2017</u> to <u>01/11/2018</u> .
	<u>01/09-10/2018</u> Meetings with constituent and stakeholder group representatives.
	<u>01/11/2018</u> 8 a.m. deadline for survey/input from constituents, stakeholders and Board members, including online survey.
	<u>01/18/2018</u> Promotional flyer draft due.
	<u>01/19/2018</u> Board to finalize Superintendent profile for the promotional flyer and online application form. (Time: <i>TBD</i> ) (option to conduct via Skype, conference call or gotomeetings.com)
Stage 3 Recruiting & Screening	<u>01/20/2018</u> Print promotional flyer. Forward to consultant.
	<u>01/20/2018</u> E-mail promotional flyer and online application instructions to interested candidates.
	<u>02/20/2018</u> Deadline for all application materials. (*See note below.)
Stage 4 Candidate Presentation	<u>03/06/2018</u> Consultant develops and finalizes interview questions and procedures with the Board. Top candidates are presented to the Board and consultant assists the Board in selecting finalists for the interviews. If desired by the Board, consultant will meet with constituents and staff interview group(s) to discuss their roles. (Time: <i>TBD</i> )
	<u>Wk of 03/12/18</u> Interview candidates (1 <sup>st</sup> round).
	<u>Wk of 03/12/18</u> Meeting with consultant following the last interview. (Time: <i>TBD</i> )
	<u>Wk of 03/19/18</u> Interview finalist candidates (2 <sup>nd</sup> round). (Optional)
Stage 5 Selection of Finalist & Future Planning	<u>Wk of 03/19/18</u> Final meeting with consultant following the last interview. (Time: <i>TBD</i> ) (option to conduct via Skype, conference call or gotomeetings.com)
	<u>TBD</u> If desired, optional on-site visit of leading candidate(s) current district by Board members.
	<u>TBD</u> Consultant will discuss contract terms with the finalist.
	<u>TBD</u> Offer the contract.
	<u>TBD</u> Press release of new Superintendent.
	<u>TBD</u> Board Self-Assessment Survey Results presented to the Board.

**\*All applications will be reviewed. Materials received after the closing date may be given full consideration depending upon the number of applications received and other factors.**

### BUILDING THE PROFILE – COMMUNITY INPUT

Ray and Associates, Inc. firmly believes in parent, staff and community participation, especially in the development of an accurate profile for the position. Our firm takes developing the profile very seriously as the profile is the focal point of our recruitment efforts. We are eager to interview each Board member individually and visit with stakeholder groups who attend scheduled meetings. We will meet with any employees and other stakeholders as identified by the Board at various locations throughout the district. Our firm also offers the opportunity for the community, staff and parents to participate in morning and evening forums that are organized to solicit input via the survey process and create dialogue by asking a series of questions related to the desired characteristics of the new Superintendent. The purpose of these meetings will be to educate them about the process as well as to gather and organize information that will contribute to the development of an accurate profile for the position.

In addition, for those stakeholders unable to attend scheduled meetings, our firm offers an online profile survey option with space for written comments/recommendations which is available in various languages at **no additional fee**. We will provide you with a link to place on the District website. Our office will maintain, collect and analyze all information received and include this in the report to the Board.

Our process consists of Q and A sessions and the administration of our own 30 Desirable Characteristics Survey. This is culminated in an open meeting report to the Board of our findings and recommendations. We will present a tabulated and analyzed graphic report in which Board members' and stakeholders' survey responses are reviewed looking for those characteristics chosen most in common by the various groups and indicate those recommended or those thought to be worthy of consideration. On some occasions, two of the items may be combined when they are closely related in context. Those items that seem to be important to some groups but not to others may be used in the recruitment of candidates and as questions during the interview process by the Board. At the encouragement of the consultants, many survey respondents will provide additional comments to the Board which are presented as a part of this report. Our dialogue with constituents and interviews with individual Board members, coupled with survey results, provide our firm with an accurate profile that is employed in the recruiting and careful screening of applicants. The characteristics most commonly selected will be used later in promotional materials.

### INTERVIEW PROCESS – COMMUNITY INPUT

Boards that have chosen the option to involve the public and employees during the interview phase of the search have found that we have been very effective in organizing this part of the process. Serious candidates who submit to being interviewed by personnel other than the Board itself are prepared for this by our consultants. Participants in these groups are requested to complete a "Candidate Impressions" form that is duplicated for each Board member's review and are requested not to rank the candidates.

It is also requested by some of our client school Boards that the top two (sometimes three) finalists are brought back to the District for an open forum with the public. We provide a proven process for this as well that includes a moderator. Questions from the audience are submitted in writing to ensure that the candidates are only asked about legitimate issues related to the position.



# RECRUITMENT

Ray and Associates, Inc. maintains a working relationship with key individuals at the college and university level along with other national public and private organizations for the purpose of recruiting outstanding candidates. However, we are not directly connected with any college, university or any other organization. This allows our firm to be extremely objective in the search process. We stay abreast of the performance of outstanding school administrators throughout the country, which has contributed to our high success rate.

Our firm maintains a very large pre-screened database of top candidates who are interested in new and challenging positions. The strengths and administrative skills of these potential candidates have been analyzed by the firm. However, it is important for our clients to know we are not a placement service that owes any favors to prospective candidates. Our professional objective is to aggressively recruit and advertise for the best candidate who meets the qualifications and characteristics of a Superintendent as set forth by the Board. Our recruitment process is very comprehensive, highlighted by the following steps:

- Largest recruiting network in the country
- Inform the firm's 170 associates of the position and seek recommendations
- Advertise in local, regional and national venues known for high readership by school leaders
- Consult our extensive database for precise matches between District and candidate profiles
- Aggressively recruit successful school leaders who are not currently seeking a new position to invite them to consider the Seattle Public Schools position
- Contact other organizations at state, regional and national levels regarding the position
- Proactively seek out potential candidates at state and national conventions



## GENERAL PROVISIONS

### CONFIDENTIALITY

The nature of our work and our ability to carry out our responsibility to you is directly related and dependent upon our present and past experience in providing similar services to others. *The firm will preserve the confidential nature of any information which becomes available to the firm resulting from the services rendered to the Board.*

As our client, you also need to maintain the confidentiality of information provided by Ray and Associates, Inc.

### FOLLOW-UP AFTER THE SEARCH: BOARD SELF-ASSESSMENT SURVEY FOCUS ON FUTURE PLANNING

Included in the base fee, the consultants from Ray and Associates, Inc. will spend time with the Board reflecting upon current Board governance procedures. In respect to governance and District initiatives, we have found that there is really no better time than very early in the tenure of a new Superintendent to assess issues and expectations.

ROUND 1: At the conclusion of the search, we will provide the Board with a link to an online survey concerning current district governance practices as well as key district challenges and opportunities for improvement. Assessment results are then analyzed and shared with the Board and the new Superintendent. The results can be emailed, presented in-person or via Skype.

ROUND 2: About six months after the new Superintendent begins, we will provide the survey again to be completed by the current Board and the Superintendent. As in round one, at no cost to the district, the results will be analyzed and shared with the Board and Superintendent to assist with teambuilding every year thereafter as long as that Superintendent is in tenure.

Through the aforementioned process, we are afforded an in-depth view of your school district. As part of our presentation, we will also provide insight and suggestions for organizational improvements. Ray and Associates has developed several training/workshops targeted at increasing organizational performance and efficiency which may be of interest to your school district at this time of significant leadership transition. Our firm belief is the workshops/training can increase the effectiveness of both the Board and Superintendent, enhance their relationship, and provide for an optimum learning environment to improve student achievement.

### SATISFACTION GUARANTEED

We provide a termination provision in our contractual agreement with the Seattle Public Schools. If the Seattle Public Schools or Ray and Associates, Inc. terminate this agreement, the Seattle Public Schools will be charged only for the work performed and expenses incurred up to the date of termination.

If the Board is dissatisfied with the new Superintendent **within two years from the date of employment** of the Superintendent and if either party dissolves that relationship by resignation or termination within a two year period of the initial employment, the firm of Ray and Associates, Inc. will conduct a new Superintendent search at **no cost** to the District, except for expenses.

## 7. Experience, Capabilities, and Availability & Capacity

### URBAN EXPERIENCE

Ray and Associates, Inc. is fully capable with strong support staff and over 170 associates the associates who will be assigned to this search will be readily available to meet all the requirements of the Scope of Work. We clearly understand the search process that is necessary for a large, urban school district to follow to be successful. In fact, we very typically receive more fully completed applications for the districts we represent than any other search firm in the country.

We strongly believe in building an accurate profile for the position and then recruiting specifically to the criteria of that profile. This involves interviewing and surveying board members as well as any constituencies as identified by the board. Our search involves looking for candidates with the appropriate skill sets and personality traits that will be a close fit for our client districts.

### RECENT URBAN DISTRICT SEARCHES

**Conducted by Ray and Associates, Inc.**

*This is not a complete list and more can be provided upon request.*

School District		
Savannah-Chatham County Public School System Savannah, Georgia	Cincinnati Public Schools Cincinnati, Ohio	Detroit Public Schools Community District Detroit, Michigan
Birmingham City Schools Birmingham, Alabama	Poway Unified School District San Diego, California	St. Paul Public Schools St. Paul, Minnesota
Deer Valley Unified School District Phoenix, Arizona	Austin Independent School District Austin, Texas	Brevard Public Schools, Brevard, Florida
Albuquerque Public Schools Albuquerque, New Mexico	Dallas Independent School District Dallas, Texas	Fort Worth Independent School District Fort Worth, Texas
Indianapolis Public School Indianapolis, Indiana	Kent School District Kent, Washington	Oklahoma City Public Schools Oklahoma City, Oklahoma
Omaha Public Schools Omaha, Nebraska	Milwaukee Public Schools Milwaukee, Wisconsin	Plano Independent School District Plano, Texas
Duval County School District Jacksonville, Florida	School District of Palm Beach County Palm Beach, Florida	East Orange School District East Orange, New Jersey
Howard Co. Public School System Ellicott City, Maryland	Boston Public Schools Boston, Massachusetts	Durham Public Schools Durham, North Carolina
Jackson Public Schools Jackson, Mississippi	Memphis City Schools Memphis, Tennessee	Kalamazoo Pubic Schools Kalamazoo, Michigan
Santa Clara County Office of Education Santa Clara, California	Charlotte-Mecklenburg Schools Charlotte, North Carolina	Newport News Public Schools Newport News, Virginia
Hartford Public Schools Hartford, Connecticut	Tacoma Public Schools Tacoma, Washington	Salem-Keizer Public Schools Salem, Oregon
Baltimore City Public Schools Baltimore City, Maryland	Guilford County Schools Greensboro, North Carolina	Knox County Schools Knoxville, Tennessee
Prince George's County Public Schools Upper Marlboro, Maryland	Rochester City Schools Rochester, New York	Racine Unified School District Racine, Wisconsin
Kansas City, Missouri School District Kansas City, Missouri	DeKalb County School System Stone Mountain, Georgia	Colorado Springs School District #11 Colorado Springs, Colorado
Paterson Public Schools Paterson, New Jersey	Broward County Public Schools Ft. Lauderdale, Florida	Oakland Unified School District Oakland, California
Trenton Public Schools Trenton, New Jersey	Collier County School District Naples, Florida	Sacramento City Unified School District Sacramento, California
Des Moines Public Schools Des Moines, Iowa	Hawaii Department of Education Honolulu, HI	Jefferson County Public Schools Golden, CO

## 8. References

### REFERENCES

We have chosen several clients from our past and recent search list to demonstrate that we have been successful in various geographic locations.

SCHOOL DISTRICT	LOCATION	CONTACT PERSON	TITLE OF CONTACT	PHONE NUMBERS/ E-MAIL
Palm Beach County School District	West Palm Beach, FL	Sandi Gero	Board Contact	Cell: 561-386-5141 <a href="mailto:gerosan13@icloud.com">gerosan13@icloud.com</a>
Detroit Public Schools	Detroit, MI	Dr. Iris Taylor	Board President	Cell: 313-310-3338 <a href="mailto:iris.taylor@detroitk12.org">iris.taylor@detroitk12.org</a>
Fort Worth Independent School District	Fort Worth, TX	Jacinto Ramos Jr.	Board President	Work: 817-814-1920 <a href="mailto:Jacinto.Ramos@fwisd.org">Jacinto.Ramos@fwisd.org</a>

*This is not a complete list, and more references can be provided upon request.*

**IN THE EVENT THAT A CONTACT IS UNAVAILABLE PLEASE REFERENCE THE ALTERNATE REFERENCE BELOW:**

SCHOOL DISTRICT	LOCATION	CONTACT PERSON	TITLE OF CONTACT	PHONE NUMBERS/ E-MAIL
Savannah-Chatham County Public Schools	Savannah, GA	Mary Davis-Brown	Board Contact	Work: 912-395-1014 <a href="mailto:Mary.Davis-Brown@sccpps.com">Mary.Davis-Brown@sccpps.com</a>



### SEARCH COST – THE COMPLETE PROCESS

The cost of our Proposal is for a complete search. The Board will be guided and assisted by Ray and Associates, Inc. at every step in the search process from the initial phase of determining the desired qualities for the position through the actual hiring of the new Superintendent. Our process is flexible. If the Board desires a different approach or would prefer certain options other than those provided in our Proposal, we can adjust our process to meet your specific requirements.

### COST BREAKDOWN

**The Consultant Fee.** The base fee for the performance of the Superintendent search by the consultant as provided in this Proposal will be thirty-five thousand five hundred dollars (\$35,500.00). If the Board selects only certain elements offered in this package, or requests services not included in this package, our fees and reimbursed expenses will be adjusted accordingly. The firm will discuss any modifications relating to the search fee regarding our services at the formal presentation. The Superintendent search fee shall be paid in three (3) installments; 1/2 of total fee is due upon signing of the contract; 1/4 of fee is due at the time of the stakeholder meetings; and the final 1/4 of fee is due when the Superintendent is officially hired by the District.

There is no charge by Ray and Associates for the services to assist the Board in negotiating a contract with the new Superintendent and the development of the contract terms.

**Consultant Reimbursed Expense.** Certain expenses, including travel, lodging, meals, shipping, and other search related expenses will be kept to a minimum and are to be reimbursed by the District. Said expenses will be invoiced as they occur and will include a detailed account listing of such expenses.

**Candidate Expenses.** If the District determines to reimburse candidates for interview expenses, expenses may include travel, lodging and meals for the candidate and spouse. Candidates are to submit all receipts and expense documentation to a designated individual at the District and said expenses will be paid as they occur.

**Cost Saving Expense Options.** Ray and Associates, Inc. is aware of budget concerns and therefore offers several cost saving options: 1) Conduct 3 meetings with our consultants via Skype, conference call or gotomeetings, which could potentially save thousands of dollars in travel expenses; 2) Utilize our materials electronically (either via e-mail or a flash drive); and 3) Boards may conduct 1<sup>st</sup> round candidate interviews via Skype to reduce candidate travel expenses. Once the Board narrows the candidates down to two or three finalists, the finalists will interview in-person with the Board.

### PERFORMANCE CONTRACT

Ray and Associates, Inc. will provide a written agreement between the Board and the consulting firm which will contain the provisions of this Proposal and any modifications or changes mutually agreed by the parties.



## ESTIMATED COST SHEET – PREPARED FOR: SEATTLE PUBLIC SCHOOLS

### Travel

Ground transportation (billed at \$0.535 per mile).....	3,250.00
Air transportation.....	5,000.00
Hotel.....	750.00
Meals .....	300.00
** Travel Subtotal.....	9,300.00

\*\*Expenses may be less if district utilizes cost saving meetings options.

**Shipping:** (Federal Express to the District, materials to search coordinator, candidate information after the candidates have been selected from the screening process)..... 500.00

Ray and Associates, Inc. Estimated Expense Total: .....9,800.00

Ray and Associates, Inc. Base Fee .....35,500.00

**Suggested Advertising Total .....\$5,000.00**

**ESTIMATED SEARCH COST (With Advertising) .....\$50,300.00**

\*\*The actual number of candidates interviewed is the Board of Education's decision. The estimate per candidate for interview expenses is \$2,000; however, it is dependent on the candidate's geographic location.

All expenses are estimates, based on past experiences. The Seattle Public Schools will be billed for only the actual expenses incurred.

Ray and Associates, Inc. will spend as much time as needed to conduct a successful search for the Seattle Public Schools. Please Note: Our flat fee is inclusive of all services. The only hourly rates that would apply would be for requests above and beyond this proposal and would be at the following rates:

**Consultant \$125.00/hr**

**Executive Search Assistant \$25.00/hr**

# **Zilo International Group**

**Presented to:**

**Diane Navarro  
Contracting Services  
Seattle Public Schools  
M/S 22-337 2445 Third Avenue S.  
Seattle, WA 98134-1923**

**Submitted by:**

**Milena Zilo  
Founder and CEO  
3939 East Arapahoe Road  
Suite 210  
Centennial, CO 80122**

***Explore the Possibilities  
Your Vision, Our Expertise***

**ZILO**  
INTERNATIONAL GROUP

**REQUEST FOR PROPOSAL NO. RFP10712**

**PROPOSAL CERTIFICATION FORM**

TO: Diane T. Navarro, Contracting Services Manager

The undersigned provider hereby certifies as follows:

1. That he/she has read the Seattle School District's Request for Proposal No. RFP10712 and the following Addenda and to the best of his/her knowledge has complied with the mandatory requirements stated herein:

Addenda Number

N/A

Issue Date

N/A

2. That he/she has had the opportunity to ask questions regarding the Request for Proposal, and that if such questions have been asked; they have been answered by the District.
3. That the proposer's response is valid for 90 days.

Dated at 1:00 PM MST, this 26th of October 2017.

  
(Signature)

Milena Zilo  
(Print Name)

Zilo International Group LLC  
(Company Name)

3939 E. Arapahoe Rd, Suite 210  
(Address)

Centennial  
(City)

CO  
(State)

80122  
(Zip)

Founder and CEO  
(Title)

milena@zilointernational.com  
(Email Address)

917-225-1851  
(Telephone Number)

(Fax Number)

(UBI Number)

October 26, 2017

Diane Navarro  
Contracting Services  
Seattle Public Schools  
M/S 22-337 2445 Third Avenue S.  
Seattle, WA 98134-1923

Dear Ms. Navarro,

Zilo International Group LLC would be pleased to provide Executive Recruiting Services for Seattle Public Schools (the District) in identifying candidates for the position of Superintendent of Schools. Please accept this letter and accompanying proposal as our formal response for this opportunity.

I am the lead partner for this engagement and will serve as the main point of contact during the entire project. We understand and can deliver the scope of services associated with this effort. The enclosed proposal is predicated upon the information you have provided and our understanding of the scope of work. It would be our privilege to assist you on this opportunity and work with you and your team. It is our hope to build a long-term relationship and assist you in other areas as well.

If you have any questions, please do not hesitate to contact me. I can be reached directly at (917) 225-1851, or via email at [milena@zilointernational.com](mailto:milena@zilointernational.com).

Sincerely,  
Milena



Milena Zilo  
Founder and Chief Executive Officer  
Zilo International Group, LLC

3939 East Arapahoe Road, Suite 210 | Centennial, CO 80122  
Mobile: 917-225-1851 | Office: 720-295-0054  
[Milena@zilointernational.com](mailto:Milena@zilointernational.com) | <http://www.zilointernational.com>

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## Executive Summary

Zilo International Group LLC is a management consulting firm incorporated in 2014 in the State of Colorado and is 100% privately held by Founder and Chief Executive Officer Milena Zilo. With resources in several countries throughout Europe, Asia and the Americas we are able to manage complex projects on a global scale across a variety of sectors.

Our consultants have worked in multiple industries accumulating vast experiences in strategic planning, working across different business units, reducing operating costs and delivering growth. We facilitate solutions during all phases of a company's life cycle, from growth and market expansion, to reorganizations and restructuring to business succession planning and successful exits.

At Zilo International Group, our organizational culture is reflected in the respectful, collaborative and non-hierarchical manner in which we conduct business and interact as a team. Internally, our environment ensures that talent is recognized and given the ability to flourish. Additionally, we are invested in our client's success and work diligently in developing actionable strategic plans with a focus on achieving measurable results and building for the future. We work collaboratively with our clients to discover new strengths and drive change, while offering innovative solutions to challenges and ensure that strategies are turned into actions. We understand the quality of product, process and service and how to implement the best strategies with your goals in mind. The values we set highest in our organization align with our actions in the way we serve our clients. Our connectivity as a team and our conviction to our purpose as consultants sets Zilo International Group apart. Our values are the driving factor in all that we do and they are more than just a slogan, we embody them in each and every day. We strive to create a culture of collaboration and excellence. We believe in the following key elements:

- **Innovation and Execution:** For companies to be competitive, they need to be innovative, think outside the box and be willing to take a leap of faith in a multitude of scenarios. We use more than just best practices in helping our clients, our team explores new policies that are just developing, creating a more innovative and strategic plan. We aim to support our clients with a life-cycle approach from an idea to fact-based analyses and operational execution.
- **Small, Expert Teams:** At Zilo International Group, we take an ecosystem approach with an investment in the long-term value of client services. We formulate dedicated teams who solely focus on the client and always have the same points of contacts. Our consultants have exposure to a variety of sectors and are knowledgeable in different types of fields. We believe in a tailored approach to meeting each client's individualized objectives.
- **Client Ownership Culture:** We work closely with clients' management and staff to complement existing resources in a culture of collaboration and shared success. Zilo International Group maintains collaboration with clients throughout the entire project, ensuring that everything is aligned with the company's original goals and making sure the company does not experience any surprises. Our consultants are continually striving to further their own industry education, certifications and skill-set. We ensure a strategy that is articulate, long term, and reinforced by mission vision and values.

## Company Profile and Qualifications of Team Members

Founder and Chief Executive Officer Milena Zilo will be the primary point of contact and project lead on this engagement. Both Eric Curry and Laurel Davis will be assisting and involved in this project and key member of the team. Below please find her biography and relevant experience. At times, we may use other consultants based on the needs and experience required for this project.



**Milena Zilo**  
**Founder and Chief Executive Officer**

Milena Zilo has nearly a decade of experience in Wall Street and International Consulting. She started her career in New York and has worked at Merrill Lynch (MER)/ Bank of America (BAC), Bloomberg LP and BlackRock (BLK). She founded Zilo International Group in 2012 and has worked with companies of different sizes in multiple industries, both domestically and internationally.

She has a broad and deep knowledge of the global markets, visible level of leadership interaction and collaboration with all key areas of the organization and executive team including organizational development and leadership management. She has developed a powerful understanding of the connections between operational activities and financials through driving change and working across different business units.

Ms. Zilo graduated in 2005 from the University of Denver with a Bachelor's degree, majoring in Finance and double minored in Economics and Legal Studies. At DU, she held numerous leadership positions and has served on the Advisory Board for Daniels College of Business and as a Board Member for the University of Denver NY Chapter. She is actively involved in the community and currently serves on the U.S Global Leadership Coalition's Colorado Advisory Committee, and as a Mentor for Boomtown Accelerator in Boulder. She has served on several other committees and non-profit boards and has a passion for philanthropy. Her experience includes visible level of leadership interaction and collaboration with all key areas of the organization and executive team including organizational development and leadership management.



**Eric Curry**  
**Senior Consultant**

Eric Curry is a Human Resources Consultant specializing in Talent Acquisition. He has over 20 years of experience working with Fortune 500 Organizations as well as start-ups to mid-size organizations in both the public and private sector.

Mr. Curry's Fortune 500 Talent Acquisition experience includes Director of Talent Acquisition with New England Financial and Talent Acquisition Manager with Quantum EPM, a division of Oracle Hyperion Division (software development) as well as years of experience as a Sr. Recruiter and Human Resource Generalist and Business Partner. In the private sector, he has worked with well-known Organizations across numerous industries that include First Data Corporation (financial services), Pfizer (pharmaceutical), Promise Healthcare (healthcare), FedEx (shipping), Veolia Transportation (transportation), and Hach (environmental services).

In the public-sector Mr. Curry has worked closely with former Secretary of State, Colin Powell on a National initiative to keep grade school children healthy through a fitness and healthy eating campaign and was responsible for hiring the task force to make that possible. Additionally, he has worked with and staffed

for the (DOT) Department of Transportation, DIA (Denver International Airport) and DIA Security, RTD (Regional Transportation District), DPS (Denver Public Schools), and for former Denver Mayor Wellington Webb on several development projects for the city of Denver.

He has mastered finding top talent in Domestic and International markets in some of the most challenging industries while utilizing the most cost effective and best practices. He achieved his degree in Organizational Development & Leadership from Purdue University with a minor in Marketing and has since been responsible for over 9,000 hires throughout his career including over 2,500 professional positions in virtually every industry.

Mr. Curry is actively involved in his community through the Rotary Club, professional Human Resources networking groups, the Chamber of Commerce, and coaching and developing youths who have entrepreneur aspirations through Junior Achievement. He also volunteers his time as a high school prep league basketball coach through the Aurora Rec League when he has the time. He enjoys traveling, photography, hiking, fitness and practicing a wellness lifestyle.



**Laurel Davies**  
**Senior Consultant**

Laurel Davies is a seasoned HR professional with 18 years experience in the private, public and government sectors. Most recently, she was Director of HR for the Colorado Department of Education, where she led all HR and Safety functions in support of K-12 in the State of Colorado.

As Vice President of Human Resources for Coleman Natural Foods, she had accountability for 2300 associates and HR operations nation-wide. She introduced new practices and programs which contributed to the company's business growth and success. Previously, she held senior HR management positions in the construction, engineering, professional services and telecommunications industries.

Ms. Davis began her professional career as a Paralegal specializing in Natural Resources and Litigation. She helped start-up the Denver office of a national legal staffing firm where she provided staffing and consulting services, and began the segue to HR.

One of her key deliverables is aligning the workforce with business priorities. Laurel can provide insight and expertise on a wide range of policies, procedures and projects, including strategic planning, change management, process improvement, talent and performance management, total rewards, legal and safety compliance and leadership development.

Ms. Davies is a Senior Professional of Human Resources (SPHR), and Senior Certified Professional with the Society for Human Resources Management (SPHR-SCP). She holds a bachelor's degree from the University of California at Santa Barbara and graduated from Denver Paralegal Institute, with honors.

She is viewed as a leader in the community and has volunteered on several non-profit Boards. She served as President of the Colorado Human Resources Association, as well as the Rocky Mountain Paralegal Association. She also served two terms as District Director for the Colorado SHRM State Council. In 2014, she was appointed to the Colorado Advisory Council for Persons with Disabilities by Governor Hickenlooper. Laurel lives in Colorado and enjoys hiking, biking, traveling and music.



# Awareness and Understanding of Seattle and Seattle Public Schools

Every client engagement is unique based on the needs of the leadership team and the organization. For a more detailed experience of the team and the individuals who will be working on this project please refer to the resumes in the Appendix section. A detailed approach will be included below in the Project Approach section.

Our team has the mix of skills, including breadth, depth, creativity and practicality, as well as the values required to be your partner. We are very excited about this project and will provide you with the resources needed.

## Project Approach

Every client engagement is unique based on the needs of the leadership team and the organization. In accordance with the scope of work outlined, Zilo International Group will provide Executive Recruiting Services for Seattle Public Schools (the District) in identifying candidates for the position of Superintendent of Schools.

Outlined below is the Strategic Talent Acquisition Process (STAP) that we utilized for finding top talent your Organization. More detail can be provided as we uncover the specifics for the exact position you are looking to hire.

### Kickoff Meeting

The kickoff meeting is an in person or conference call that includes the hiring manager, all involved in the hiring decision process, and our Talent Acquisition Specialist. We will discuss the expectations, the plan of action, and provide ongoing weekly updates throughout the entire recruitment process until we have a hired candidate. We will also discuss the culture of the Organization, the Hiring Managers management style and personality, to ensure we present the best “fit” candidate beyond their resume and qualifications. During our kickoff meeting we will also the following topics:

- A) The Job Description. Is the job description updated and does it accurately outline the scope of work the new hire will be performing? We want to ensure the talent pipeline we will be providing aligns properly with the skillsets required for the selected candidate to be successful. Using this information, we will compile a job posting that will feature the key selling points and benefits of working for your organization and highlight the requirements and skills needed for the position.
- B) Compensation Review. We will review with you the budgeted compensation range for the position to ensure it aligns with the required skillset for your specific market. Maybe due to the increased cost of living in your market over the years or perhaps some additional skillsets and requirements have been added since the original job description was created, we will insure that your compensation package for the market is competitive to ensure we are reaching the top talent.
- C) Screening and Questioning. From the requirements and skills gathered from the job description, we can provide strategic interview questions and testing (if needed). If you already have designated interview questions for your open position, we can review them to ensure all bases are covered so that upon completion of our Talent Acquisition Specialist initial screening using a Behavioral Questioning Model you will only being forwarded candidates who pass and qualify for further consideration and not be bogged down with candidates who do not meet your criteria.

### The Strategic Search

We will create a strategic search to locate the top talent using the most time efficient resources available. Some of our resources include, but are not limited to:

- A) Job Boards – mainstream job boards, career and industry specific job boards, your company career page.
- B) Social Media platforms – LinkedIn, Glassdoor, and industry specific network groups, etc.

### **Screening and Interviewing**

We will provide thorough screening and interview questioning to each qualified candidate and forward you their resume, interview notes, timeline, salary expectations and any other vital information you might need to assist in your decision making process and can assist in coordinating the next round in-person interview for you.

### **Tracking, Reporting and Feedback**

We closely monitor our efforts and your feedback so that we can make any changes as needed to ensure we are reaching the talent pool we are targeting - what's working and does anything need to be revised. Perhaps, in some cases, we made need to expand our search statewide or even nationally based on the applicant flow we are getting.

We will provide frequent updates that will include applicants, initial interviews, and also establish timeline expectations and turnaround feedback from the search committee regarding feedback on next steps with the candidates who you would like to further consider.

Because we understand that ultimately the hiring decision is in your hands, we will act as the liaison between you and the candidate and can offer to be as involved as you would like us to be – from screening candidates to conducting pre-employment background checks and drug screens to drafting offer letters. Our job is to make yours easier.



#### **1. Discovery: Vacancy and Evaluate Need**

- Step 1: Set strategic direction in conjunction with the search committee to understand the current needs and goals for the District and learn more about the position, pay and benefits offered.
- Step 2: On Site Discovery
  - Analyze past duties, performance to assess skills required for the position
  - Conduct interviews with Leadership Team
- Step 3: Develop position description for Job Description
- Step 4: Develop the position's compensation package

#### **2. Analysis: Develop Recruitment Plan**

- Step 1: Review current recruitment process with the District's search committee
- Step 2: Search Strategy Identification
  - Construct comprehensive marketing platform to engage potential candidates
  - Utilize online networks, social networks and industry job placement networking resources
- Step 3: Develop interview questions and key characteristics

#### **3. Recommendation: Review Applicants and Identify Qualified Candidates**

- Step 1: Candidate Identification
  - Review resumes
  - Confirm education and financial information

#### **4. Implementation: Conduct Interviews**

- Step 1: Interview candidates via virtual interviews
  - Qualify and Interview Candidates

- Validate references and experience
- Evaluate Candidates and provide a summary of each
- Develop a semi-finalist list to be reviewed by the search committee
  - Complete assessment/applicant testing of semi-finalist candidates
  - Submit assessment reports to search committee with list of semi-finalists
- Step 2: Create list of finalists
  - Work with the search committee to select the most qualified candidates for the list of finalists
  - Facilitate interviews and coordination with finalists
    - Organize visits by the finalists
      - Conduct face to face interviews
    - Assist search committee and Human Resources to identify key skills of the finalists and assist in the selection of a finalist
- Step 3: Select finalist
  - Offer top candidate the position
  - Work with Human Resources to negotiate with the finalist
- Step 4: Finalize Recruitment
- Build integration and onboarding plan for the new candidate

## Proposed Schedule:

Though deadlines will be better assessed during the discovery and interview phase, we propose the following timeline for this engagement:

Month 1:	Month 2	Month 3-4	Month 5-6
<ul style="list-style-type: none"> <li>Client Discovery</li> <li>Develop Position Description</li> </ul>	<ul style="list-style-type: none"> <li>Search Strategy Identification</li> <li>Candidate Qualification</li> </ul>	<ul style="list-style-type: none"> <li>Create Semi-Finalist List</li> <li>Semi-Finalist Assessment</li> </ul>	<ul style="list-style-type: none"> <li>Finalist Interviews</li> <li>Offer job to Top Candidate</li> </ul>

## Experience, Capabilities, and Availability and Capacity

With resources in several countries throughout Europe, Asia and the Americas we are able to manage complex projects on a global scale across a variety of sectors.

We work with organizations of all sizes in the private, public and nonprofit sectors. Our consultants have worked in multiple industries accumulating vast experiences in strategic planning, working across different business units, reducing operating costs and delivering growth. We facilitate solutions during all phases of a company's life cycle, from growth and market expansion, to reorganizations and restructuring to business succession planning and successful exits.

Our team has the mix of skills, including breadth, depth, creativity and practicality, as well as the values required to be your partner. We are available and very excited about this project and will provide you with the resources needed.

## References

Jesse Russell

University of Denver, Daniels College of Business Advisory Board

Contact Information: 720-352-4494, [Russell.Jesse@gmail.com](mailto:Russell.Jesse@gmail.com),

Jeff Ramos

General Manager, Cosumnes Community Services District, Elk Grove, CA

Contact Information: 916-405-7150, [JeffRamos@yourcsd.com](mailto:JeffRamos@yourcsd.com)

Janet Martin

HR Consultant, Colorado Department of Education

Contact Information: 720-771-9742, [martinbubbly@aol.com](mailto:martinbubbly@aol.com)

Mark Weinberg

VP of Compensation, First Data Corporation

Contact Information: 702-755-5626, [mpweinberg@yahoo.com](mailto:mpweinberg@yahoo.com)

Bryan Fischer

Human Resources Manager, Gastroenterology of the Rockies

Contact Information: 720-932-7711, [bfischer@medamorph.com](mailto:bfischer@medamorph.com)

Mike Martin,

Sr. Lead Developer, Oracle/Quantum EPM

Contact Information: 720-840-1067, [mike.martin2000@yahoo.com](mailto:mike.martin2000@yahoo.com)

## Pricing

Zilo International Group proposes a flat fee of \$65,000 for this search. Any travel expense, which would include lodging, per diem, transportation etc. will be billed separately.

We understand that at times there may be budgetary constraints within an organization and are open to further discuss it. We have done our best to estimate the need for this project based on the information provided in the RFP. We hope to foster a longer term professional relationship with you and are excited about this opportunity.

# Appendix

## Resumes

### MILENA ZILO

Over 10 years of professional experience in Wall Street, Corporate Finance and Consulting. My competencies include a broad and deep knowledge of the global financial markets, the ability to identify, analyze and articulate successful investment events and opportunities. Visible level of leadership interaction and collaboration with all key areas of the organization and executive team. Experience with domestic and international partners, including government officials and business professionals, have lived abroad and visited over 20 countries.

- Budgeting and Forecasting
- Financial Reporting
- Business/Corporate Development
- Strategic Planning
- Risk Management
- Cross-Functional Team Leadership
- Corporate/Investment Finance
- Growth and Expansion Strategies
- Profitability and Cost Analysis
- International Business/ Asia/Europe
- Project Management
- Product Management and Marketing

#### Professional Experience

##### **Zilo International Group LLC, US, Europe, Asia**

###### *International Consulting*

2012 – Present

- Spent 2 years in Europe and Asia assisting organizations and entrepreneurs in underlying business tribulations and suggesting solutions to improve efficiency, financial decisions, cut costs and accelerate growth and optimize performance
- Met with government officials, business professionals and financial agencies to discuss opportunities and business developments in the country and region
- Lead teams in business planning and development, marketing activities, demand assessment and customer retention as well as strategic planning in entering new markets/launching new products, merger and acquisitions, raising capital and private funding
- Worked closely with senior executives and leadership as well as Corporate Development and Strategy group with market research, due diligence and valuation analysis on proposed plans to identify opportunities/threats, maximize efficiency, reduce cost structure and to align financial expectations, impact and overall company strategy
- Created and worked on complex financial models such as Net Present Value (NPV), Return on Investment (ROI), Payback Period, Discount Cash Flows (DCF), Value at Risk (VAR) and prepared presentations for senior management and leadership team
- Managed the financial planning and analysis for budgeting, forecasting, benchmarking and long range strategic planning on several projects
- Coordinated the preparation of financial reports and analyses on a monthly, quarterly and annual basis; Ensured maintenance of appropriate internal controls and financial procedures
- Experience with evaluating enterprise risk, through mitigation planning, implementation and progress monitoring, as well as managing the company's commercial insurance policy, accountable for obtaining all necessary insurance (commercial, umbrella, property, loss and control, worker's comp and cyber) and coordinating renewal process.

##### **BlackRock, Princeton, NJ**

###### *Private Equity Partners Fund*

2011 – 2011

- Prepared quarterly and annual financial reports as well as partner capital statements for distribution to limited partners and ensured compliance with appropriate GAAP standards and regulatory requirements
- Performed in-depth due diligence on new disclosure distribution calculations including waterfall calculations and cash positions

##### **Bloomberg, New York, NY/ Princeton, NJ**

###### *Fundamentals and Earnings Equity Research*

2007 – 2010

- Responsible for Oil and Gas sector, covered over 30 companies primarily large and mid-cap

- Analyzed financial statements such as balance sheets, income statements, cash flows, 10K/10Q, in addition to company/industry reports to make accurate decisions in projecting a company's current and future financial performance
- Prepared valuation materials based on comparable, precedent transaction analysis, industry key drivers and market trends
- Performed ratio analysis, financial modeling and wrote research reports based on the findings
- Member of the Accounting Committee; discussed and examined current market practices and developments arising from accounting standards in accordance with GAAP, FASB, IASB, and SEC
- Extensive interaction with cross-divisional teams at Bloomberg, including news, company guidance as well as investor relations, management of companies under coverage and buy/sell side analysts

### **Merrill Lynch, New York, NY**

*Investment Management*

2004 – 2007

- Member of a team that worked primarily with institutions and high net worth individuals
- Analyzed investment strategies, prepared investment proposals based on client's needs and risk profile and held ongoing reviews to ensure effectiveness of portfolio and to identify necessary updates
- Utilized financial modeling techniques and Monte Carlo simulation to ensure that the asset allocation of client portfolios was diversified across the sectors of the Standard & Poor's 500
- Coordinator of managed account activities with responsibilities such as scheduling seminars, generating client-specific reports, and maintenance of marketing materials

### **Citi, New York, NY**

*Summer Internship*

2004 – 2004

- Participated in structured training program at Smith Barney; gained insight into sale practices, market trends and product/ service knowledge
- Prepared pitch books and managed multiple tasks among a variety of teams.

### **Education**

#### **University of Denver, Denver, CO**

2001 – 2005

Bachelor of Science in Business Administration

*Field of Study:* Major in Finance; Double Minor in Economics and Legal Studies

*Activities and Societies:* Elected by Undergraduate Student Body to Represent in Student Government (Senate) - Daniels College of Business Senator, University Programs Council Governing Board- Homecoming Committee Chair, Council of Undergraduate Business Students - CO Chair, St. Jude Hospital Foundation- Finance Chair, Alpha Gamma Delta Sorority - Risk Manager, Greek Judicial Board, Peak Leadership Program, Peer Mentor

### **Additional Information**

- **Professional Affiliations/ Boards:** U.S Global Leadership Coalition's, Colorado Advisory Committee Member (2017 - Present), Boomtown Accelerator, Mentor/ Advisor (2017 - Present), Daniels College of Business - Advisory Board and Committee Member (2014 - 2017), American Cancer Society – Associate Board of Ambassadors and Gala Executive Planning Committee (2016 – 2017), Colorado Symphony – Annual Ball Volunteer (2016), Denver World Affairs Council - Member (2014 - 2015), APEN - Co-Founder, Board Member and Advisory Board Chair (2006 - 2011), University of Denver NYC Alumni Chapter - Board Member (2006-2011), Street Wise Partners - Junior Board Member and Adult Program Mentor (2008 - 2010)
- **Professional Certifications:** Financial Industry Regulatory Authority: Series 7- General Securities Representative Exam, Series 66 – Uniform Combined State Law Exam (New York)
- **Computer Skills:** MS Office: Excel, PowerPoint, Word, Bloomberg Terminal, Capital IQ, Crystal Ball, Oracle, SAP, Serengeti Law
- **Honors and Awards:** Chutzpah Award - Oprah Winfrey, Mentor-Mentee Partnership Award - Street Wise Partners, Outstanding Student Leader Award by University of Denver Appeared on: ABC News, Fox News, Good Morning America, Oprah Magazine, Washington Post, Denver Post, Detroit News, Boston Globe, Milwaukee Journal Sentinel, Houston Chronicle, Clarion Newspaper, University Business, College Confidential, and several International Print and TV Media



# ERIC CURRY

Talent Acquisition Consultant

## RELEVANT EXPERIENCE

More than twenty years' experience in Talent Acquisition, Human Resources, Sales, and Management Consulting ranging from small business to numerous Fortune 500 Organizations as both a permanent employee and as a contract contractor in numerous industries including Healthcare, Financial Services, Insurance, Telecommunications, Transportation, and Technology (IT, Software, Engineering). A spirited team leader that enjoys implementing streamlined solutions and enhancing business operations through utilization of "Best Practices".

## Professional Strengths

- ✓ Effective Interviewing and Investigative Skills
- ✓ Develop Strategic Recruiting Strategies
- ✓ Highly Skilled Talent Acquisition Expert
- ✓ Ability to Manage Multiple Tasks & Projects
- ✓ Experienced Human Resource Business Partner
- ✓ Manager Interview Training
- ✓ Highly Self-Motivated Team Player
- ✓ Strong Leadership and Sales Skills
- ✓ Employee Relations Professional
- ✓ FINRA/SEC Social Media Best Practices

*Trained on over 20 different Applicant Tracking Systems and various HRIS Systems*

## Contributions, Highlights, and Accomplishments

- ✓ Led Talent Acquisition team to hire more than 1,000 employees a month for six consecutive months as Director of Recruitment for Clarity Media Group, a Philip Anschutz Corporation
- ✓ Implemented effective "Best Hiring Practices" resulting in increased employee satisfaction and reduction in turnover for numerous Organizations.
- ✓ Professional Courses and Certifications through MSEC in Human Resources and Interviewing
- ✓ Train Hiring Managers on Best Hiring Practices and ethical interviewing skills
- ✓ Lead Recruiter for the 2010 Census call center project through Convergys (Government contract)
- ✓ Experienced in Healthcare, Hospital Groups, and multiple Clinic facility recruiting efforts
- ✓ Experienced in Employee Relations, New Hire Orientations, and Training and Development

## Employment History

Zilo International Group, Centennial, CO 09/17 – Present

### ***Sr. Consultant***

- Sr. Consultant for recruitment engagement for firm clients
- Working with business and functional leaders to define competencies for specific roles
- Serve as a company spoke person at events and seminars

Gastroenterology of the Rockies, Louisville, CO 02/17 – 07/17

### ***Sr. Recruiter***

- Full cycle Recruiter for 9 locations throughout the Denver metro area including the Corporate office
- Selected and implemented a new Applicant Tracking System for the company
- Source, screen, interview, and made recommendations to hiring managers for all open positions
- Populated database with all applicants and conducted training for all Hiring Managers on the new ATS

Quantum EPM, Denver, CO 12/15 – 06/17

### ***Talent Acquisition Manager***

- Managed the Talented Acquisition team of 4 recruiters in a partnership with Oracle software applications

- Conducted weekly remote conference calls with recruiting team and bi-monthly remote meetings with Managers
- Worked with a budget to execute and implement a successful recruitment strategy
- Company spokesperson at job fairs and campus recruiting events with recruiting team

MasTec Advanced Technologies, Centennial, CO 05/15 – 10/15 (various contracts over the past 5 years)

***Sr. Recruiter***

- Recruiter for AT&T Digital Life – Home Security Division
- Supported all U.S Markets recruiting efforts alongside 5 additional recruiters
- Source, screen, interview, and make recommendations to Hiring Managers
- Utilized and coordinated job boards, and social media recruiting campaigns

Hach (A Danaher Corporation), Loveland, CO 06/14 – 05/15

***Corporate Recruiter (contract)***

- Recruiter for North America for Engineers, IT, Sales, and Management for water instrumentation company
- Supported all U.S Markets recruiting efforts alongside 3 additional recruiters
- Full cycle Recruiter including sourcing, screening, interview, and made recommendations to hiring managers
- Utilized LinkedIn Recruiter, job boards, and other social media recruiting campaigns
- Company representative at career recruiting events including college hiring events

EMC2, Denver, CO 03/01-12/13

***Founder/Talent Acquisition Specialist/HR Business Consultant***

- Established an independent staffing and Human Resources consulting service
- Provided contract recruiting services for numerous Fortune 500 Organizations
- Specialized in the Financial Services, Insurance, Medical, Telecommunications industries
- Supported numerous departments including Operations, Sales, Marketing, Accounting, Finance, and Legal
- Successfully devised strategic recruiting plans for upcoming human capital needs within various departments
- Successful placements in Financial Services, Insurance, IT, Sales, Marketing, Accounting and Legal, and Medical

Skinny Pineapple, Boulder, CO

***Interim Director of Human Resources (contract/temp)*** 06/13 – 12/13

- Provided full cycle recruiting efforts for Operations, Sales & Marketing Departments
- Designed and executed recruiting strategy and growth plan for 3<sup>rd</sup> quarter of 2013 and 2014
- Acquired and implemented the companies first Applicant Tracking System (Paycom-Talent Acquisition)
- Responsible for all Employee Relations matters and advise department managers
- Managed employee insurance benefits and claims

New England Financial/A MetLife Company, Greenwood Village, CO 03/12 -12/12

***Talent Acquisition Director (contract)***

- Managed the entire recruitment process for the Denver and Colorado Springs offices
- Targeted and hired top producing FINRA registered Financial Advisors from competitors
- Recruited Insurance Specialist and supported Operations hiring needs
- Created and implement a successfully recruiting strategy for both Denver and Colorado Springs

I-Behavior/A KBM Group company, Louisville, CO 3/11 – 12/11

***Senior Corporate Recruiter (contract)***

- Solely responsible for the companies entire recruiting efforts
- Supported IT operations (Developers, Analyst, Tech Support) positions, Accounting and Finance
- Full cycle recruiting including postings, social media, sourcing, salary negotiations and offer letters
- Business partner advisor to hiring manager
- Recruited for parent company, KBM Group based in Texas

Clarity Media Group/Examiner.com, Denver, CO 01/09 – 12/09

***Director of Recruitment (contract)***



- Hired and managed a team of 3 full time recruiters to achieve companies aggressive hiring goals
- Developed a recruiting strategy that exceeded hiring goals ahead of schedule and under budget
- Hired web developers, tech support, content writers, advertising agents that totaled 1,200 hires nationwide
- Executed a successful Employee Referral Program

Specialized Loan Servicing, Highlands Ranch 01/08 - 12/08

**Senior Recruiter**

- Full cycle lead recruiter that supported the Call Center, IT Department, Legal Department and Finance Dept.
- Business Partner to the Executives to ensure their departments were fully staffed in a timely manner
- Served as the Employee Relations resource for all departments
- Conducted weekly new hire orientation and ongoing career training
- Conducted “Train the Trainer” classes on best interviewing practices to Hiring Managers

**Purdue University, West Lafayette, IN, Bachelor of Science**  
**Dual Major: Organizational Development and Leadership/Marketing**

**Additional Contracted Clients**

**Parke-Davis Pharmaceuticals , First Data Corporation, Veolia Transportation, State Farm Insurance, All State Insurance, Kaiser Permanente, FedEx Ground, HomeAdvisor, I-Behavior, Match.com, Eli Lilly, Amgen, Pfizer, Hach, RTD, UPS**

**Laurel A. Davies, SPHR & SHRM-SCP**

**PROFESSIONAL SUMMARY**

Results-driven **Human Resources Leader** with a hands-on approach and a unique combination of operations, management, legal and HR experience. Lead initiatives that align the workforce, create a high performance culture, accelerate change and maximize organizational effectiveness. Private and public sector experience spanning from successful business start-up to Fortune 500 organizations. Industries include Construction, Engineering, Food/Manufacturing, Professional Services, Telecommunications and Natural Resources.

**PROFESSIONAL EXPERIENCE**

**Zilo International Group LLC** Denver, CO

**9/2017 – Present**

Assist a wide variety of clients with recruitment, talent management, training design and delivery and policy development, communications/culture management, leadership development and merger/acquisition integration and help build more effective organizations.

**HR Preneur, Strategic Business Consulting & Interim HR Service Delivery** Denver, CO

**6/2017 – Present**

Deliver customized service plans to support client's strategic business initiatives, including change management, communications/culture management, leadership development and merger/acquisition integration. Serve as a hands-on resource for employee relations, legal and safety compliance, process improvement, talent management, training design and delivery and policy development.

**State of Colorado, Department of Education/DPA** Denver, CO

**11/2013 – 5/2017**

**Director of Human Resources:** Oversee all HR functions and serve as a member of the Commissioner’s Cabinet. Navigate within a highly dynamic and political environment. Responsibility for strategic HR, talent acquisition, employee relations, total rewards, performance management, safety and risk management, leadership and organizational development, policy development, communications, systems improvement and legal compliance.

**Coleman Natural Foods/Perdue Farms,** Lakewood, CO (Market leader organic chicken)

**6/2008 –3/2013**

**Vice President Human Resources:** Provide strategic HR and Safety leadership, overseeing the development and implementation of HR policies, programs and high quality service delivery for 2300 associates nationwide. Advance best practices and guide HR Directors, Business Partners and Safety Directors to execute relevant, impactful workforce solutions in union and union-free environments. Report directly to Coleman CEO and serve as key member of executive team. Following acquisition by Perdue in 2011, collaborated with cross-functional integration team to identify and achieve cost synergies, process improvements and acquisition objectives.

- Designed and launched enterprise-wide performance management, compensation and bonus program, strengthening individual and business unit accountability. Exceeded stretch EBITDA goals 3 consecutive years and established culture of achievement.
- Created alignment by developing a communications plan to engage employees and cascade Strategic Objectives through the organization. Built a committed and engaged workforce through open communications and establishing an environment of mutual trust, respect and cooperation between employees and management.
- Oversee \$12M Benefits budget, including financial impact analysis, renewal strategies, determination of rates/cost share, and open enrollment communications.
- Achieved 40% reduction in turnover through deployment of HR initiatives designed to attract, develop and retain talent, while facilitating exit of low performers.
- Participated in collective bargaining strategies and negotiations for 8 Union contracts. Analyzed financial impact of wage and benefit options and proposals. Consistently held overall annual increases to 1.5% or below over life of contract.
- Developed safety metrics and championed a safety culture nationwide, reducing DART from 7.4 to 2.5 and decreasing annual Workers' Compensation claims by \$1.3M first year. Established safety reward and recognition program for individual and team contributions.
- Drive HRIS/Payroll system conversion and consolidation to achieve economies of scale. Streamlined business processes and brought consistency across organization by eliminating diverse leave policies and creating a standardized PTO policy.

**Trane Commercial HVAC, Denver, CO** acquired by *Ingersoll Rand* (Leader climate solutions) **12/2006 –6/2008**

**Human Resources Leader – Rocky Mountain District:** Deployed high impact HR and business initiatives to shape employee and organizational development during period of rapid change and M&A activity. Leveraged HR and safety resources to deliver value-added support. As an influential member of senior management team, provided expertise in building intellectual capital, cultivating talent and diversity, as well as encouraging progressive management.

- Optimized HR delivery by driving continuous improvement of systems, reports and Sarbanes-Oxley processes and controls. Effectively transitioned HR from a transactional function to strategic partner.
- Designed and delivered interactive soft-skill workshops to sales professionals and managers across multi-state region to achieve engagement, accountability, sales growth and exceptional customer service.
- Enhanced bench strength and positioned organization for long-term success through implementation of comprehensive succession and leadership development plans for key management roles.
- Served as escalation point for conflicts, employee relations and legal issues, promoting a positive work environment and mitigating potential exposure to risk and liability.

**Sanford/Beazer Homes, Englewood, CO** (Fortune 500 company and Top-10 homebuilder) **9/1999 – 10/2006**

**Director of Human Resources – Colorado Division:** Responsible for driving strategies for talent management, workforce planning/budgeting, total rewards, performance management, training and development, employee relations, diversity/inclusion, and risk management. Collaborating with President, facilitated strategic planning and leadership development retreats for senior management team. Communicated vision, mission, values, and branding company-wide to inspire positive change, and enable organizational success.

- Facilitated integration of corporate cultures, and changes in strategy, product, benefits, leadership, processes and systems, following acquisition by national industry leader. Colorado Division doubled number of homes built over next 3 years.
- Developed organizational effectiveness strategies and training to improve employee and customer satisfaction metrics, including improvement on 13 of 14 benchmark questions on employee survey.

- Reduced turnover and enhanced employee engagement by introducing best practices such as employee referrals, onboarding, diversity, exit interviews, career development, and succession planning.
- Created 20-hour leadership development program to support the professional growth and development of high-potential and succession candidates (Trust, Accountability, Leadership, Communications, etc.)
- Built Safety Program from scratch, establishing policy, training construction staff, implementing safety audits and investigation procedures, and providing rewards/recognition for safety performance.

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#### **EDUCATION & CERTIFICATIONS**

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**Bachelor of Arts, *University of California at Santa Barbara***

**Senior Professional of Human Resources (SPHR)**

**Society for Human Resources Management, Senior Certified Professional (SHRM-SCP)**

**DDI Certified Facilitator, *Development Dimensions International***

***ELI Training Instructor, Build a Civil Workplace***

**Paralegal Certificate (Honors), *Denver Paralegal Institute***

**Mediator, *Center for Dispute Resolution***

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#### **BOARD LEADERSHIP**

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**Colorado Advisory Council for Persons with Disabilities, *Appointed by Governor Hickenlooper (2014)***

**Colorado SHRM District Director, *Society for Human Resource Management (2010 & 2013)***

**President / Board of Directors, *Colorado Human Resource Association (2000 – 2005)***

**President / Board of Directors, *Rocky Mountain Paralegal Association (1988 -1992)***

*Thank you for your time  
and consideration*

*Explore the Possibilities  
Your Vision, Our Expertise*

**ZILO**  
INTERNATIONAL GROUP