

PORT TOWNSEND SCHOOL DISTRICT NO. 50
Special School Board Meeting, 3:00 p.m.
March 25, 2016
“Discover the Power of Learning”

Mission:

In partnership with home and community, Port Townsend School District provides a learning environment where each student develops the knowledge and skills to become a creative, successful and engaged citizen.

01. Location/Time

01.01 Gael Stuart Building, 1610 Blaine St., Room S-11, Port Townsend, WA, 3:00 p.m.

02. Call to Order

02.01 Roll Call

03. Agenda

03.01 Approval of Agenda

04. Public Comments

05. Presentation from McPherson & Jacobson, LLC, Superintendent Search Firm

06. Executive Session (if needed)

07. Adjournment

A Proposal Prepared for

***Port Townsend
School District
Port Townsend, Washington***

for

*The Search and Selection of a
Superintendent of Schools*

submitted by

MCPHERSON *MJ* JACOBSON, LLC

Executive Recruitment & Development



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March 17, 2016

Board of Directors
Port Townsend School District
1610 Blaine Street
Port Townsend, Washington 98368

Thank you for inviting us to present our services to your board. The enclosed proposal describes the professional services McPherson & Jacobson, L.L.C. will provide Port Townsend School District in ensuring your superintendent search secures quality leadership for the district.

Our firm's five-phase protocol allows the board to concentrate on the most important segments: the interview and selection of the successful candidate. Our team of consultants, working in conjunction with the board and 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
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Telephone: 402-991-7031/888-375-4814
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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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The McPherson & Jacobson Difference

“It’s About the Kids”

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

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

One of the hallmarks of McPherson & Jacobson, L.L.C. is the belief that the search for a public executive should be conducted with as much transparency as possible. We have designed a process, which keeps the board in complete control of the search, while inviting various stakeholder groups to provide input and become meaningfully involved in the process. The openness of the process has not gone unnoticed. In the *Transparency—The McPherson & Jacobson Difference* section of this proposal you will find a selection from the many articles discussing McPherson & Jacobson’s stakeholder involvement, and editorials from newspapers across the country praising boards for being open, transparent, and doing the public business in the public.

We have an **over 80 percent retention rate** for our placements in the past five years, **60 percent** are in place in the past ten years, and **almost half** of our placements are still in the position for which we placed them in the past 15 years. These statistics speak for our ability to create a good match.

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

Leading National Search Firm

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 600 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. Almost 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

Organizations using the McPherson & Jacobson protocol have enjoyed sustainability of leadership.

Over the last five years, **over eighty percent** of administrators are in the position for which they were hired. **Sixty 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.

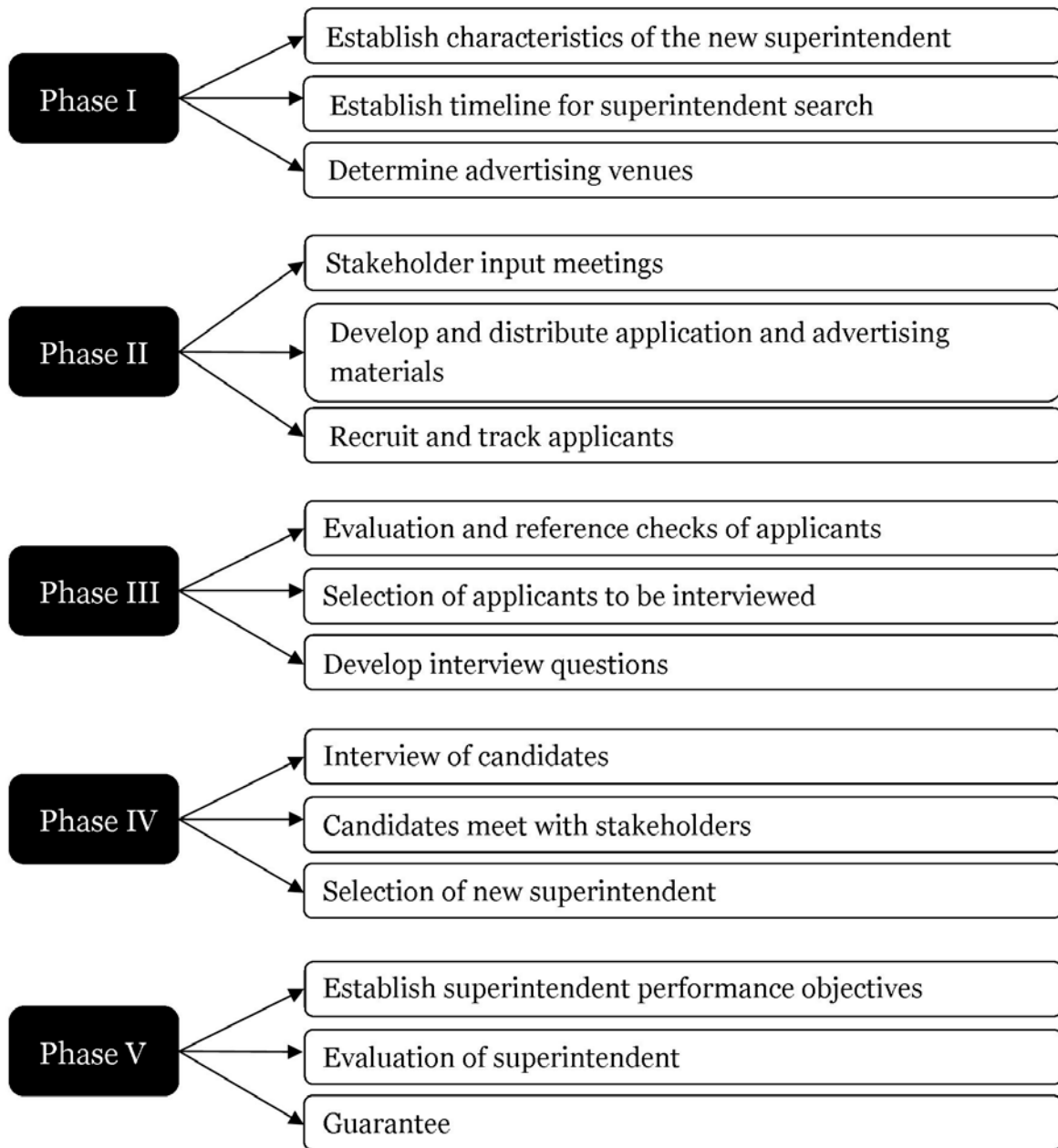
Executive Summary

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

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

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

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.

✓ **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.

"Very professional and knowledgeable consultants that know Washington"
Jennifer Leach, Longview School District No. 122, WA

"We would have found this process highly inefficient and cumbersome without the services of McPherson and Jacobson. They provided a great service for what seemed a reasonable cost to our school district."

Trish Hart, Mount Baker School District, Deming, WA

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. For any unable to attend a stakeholder meeting, we provide an online version of the questions we ask the groups. 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.

✓ **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) 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.

✓ **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.

✓ **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.

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.

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

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

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

✓ **Assist the board in 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.

✓ **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.

Phase IV

In Phase IV McPherson & Jacobson's consultants will:

✓ **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.

Working with the board and the point of contact, 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.**

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. In order 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.

✓ **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.

“The interview/visitation day process was almost "perfect" and provided fantastic feedback from a variety of groups. Both consultants were easy to work with and very responsive to our questions/concerns/requests.”

Tumwater School District, WA

“We have a young board that I think would have struggled with the processes of finding candidates due to lack of experience. Our consultant did a great job finding numerous candidates in what sounds like a tough time of year to start this process. He had good background information on the candidates, especially on the ones that maybe had some questionable past experiences that would have raised concerns had we tried doing this process on our own. He also was able to answer all questions we had.

Dan Perron, Wishkah Valley School District, Aberdeen, WA

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.

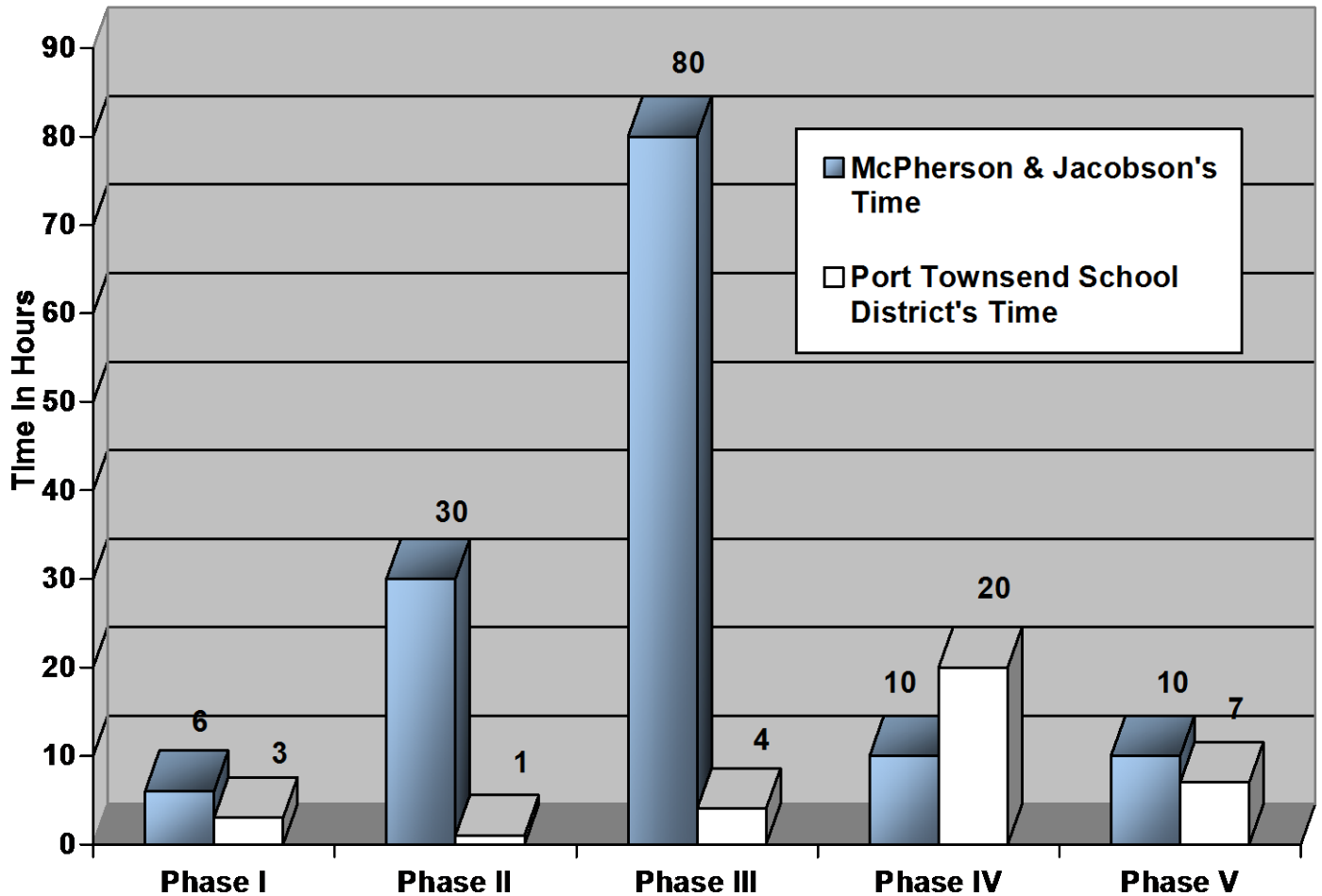
We are convinced that our process of identifying your most important selection criteria, meaningfully involving stakeholders, screening candidates against the criteria, and working with you during the critical first year, will ensure your search results in quality leadership for education excellence.

“Simply put - the best value I've received from any consulting firm in business.”
Dan Weedin, North Kitsap School District, Poulsbo, WA

“Well worth the money spent. I don't believe we could have done this without the help of an excellent consultant.”

Anne Burkart, Port Townsend, WA

Comparison of Time Requirements for a Superintendent Search



Based on past searches, the above graph represents board members' investment of time with the search process as compared to McPherson & Jacobson.

McPherson & Jacobson has designed a protocol that allows the board to concentrate on your most important responsibility, selecting the best-qualified leader for your district.

Timeline

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

Search sequence:

- At the beginning of the search
 - 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
 - Stakeholder group meetings are held
 - A summary of stakeholder input is presented to the board

- As applications arrive in our office
 - Applications are monitored and applicants are notified of the deadlines to submit their materials

- After the closing date
 - All the completed applicant files are forwarded to the consultants
 - The consultants begin the review and pre-interview process

- Approximately two to four weeks after the closing date
 - Consultants provide information to the board on all applicants who completed the process
 - Consultants present summary profiles of qualified candidates to the board
 - The board selects the candidates it wants to interview
 - McPherson & Jacobson notifies each applicant not selected for an interview

- Soon after the board selects their candidates
 - Semi-finalist interviews are conducted (if chosen by the board)
 - The board interviews its final candidates
 - The board selects their new superintendent
 - A criminal/financial/credential verification background check is conducted on the selected candidate
 - McPherson & Jacobson's consultants contact each candidate who was interviewed to notify them of their status

Responsibilities of Port Townsende School District and McPherson & Jacobson, L.L.C.

Event	McPherson & Jacobson's Tasks
1 st board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> The consultant guides the board in determining the following items <ul style="list-style-type: none"> o Characteristics for the new superintendent o The search calendar o Compensation parameters o Identify the appropriate constituent groups for stakeholder input o Advertising venues <input type="checkbox"/> The consultant works with the Point of Contact to compile: <ul style="list-style-type: none"> o Information to create the brochure announcing the vacancy o The list of names to be invited to the community input meetings
After 1 st meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Application link is posted online <input type="checkbox"/> Brochure announcing the vacancy is created <input type="checkbox"/> Advertising is started <input type="checkbox"/> Vacancy announcements are sent out <input type="checkbox"/> E-mails are sent to applicants registered with McPherson & Jacobson notifying them about the opening <input type="checkbox"/> E-mails are sent to consultants regarding the opening, requesting they invite candidates to apply for the position <input type="checkbox"/> Opening is posted on social media and additional venues
During application period	<ul style="list-style-type: none"> <input type="checkbox"/> Consultants recruit candidates that fit the position <input type="checkbox"/> Monitors applicants and where they are in the application process <input type="checkbox"/> Notifies applicants of the closing date for submitting their materials <input type="checkbox"/> Lead consultant keeps the board chair up-to-date on the search
Stakeholder meetings are scheduled	<ul style="list-style-type: none"> <input type="checkbox"/> Home Office sends out invitations to the community stakeholder meeting(s) after receiving the information from the consultant and the district
Stakeholder meetings	<ul style="list-style-type: none"> <input type="checkbox"/> Consultants facilitate the stakeholder meetings, recording the input <input type="checkbox"/> An online stakeholder input survey is created, the link is posted on the McPherson & Jacobson website and also provided to the district to post
Stakeholder meetings completed	<ul style="list-style-type: none"> <input type="checkbox"/> Consultant summarizes key themes and gives the results to the district <input type="checkbox"/> Copy of summary is sent to Home Office <input type="checkbox"/> The stakeholder input summary report is created
2 nd board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Review stakeholder input summary report and provide copies to the district <input type="checkbox"/> Review press release <input type="checkbox"/> The consultant guides the board in determining the following items <ul style="list-style-type: none"> o Interview questions o Length of contract, moving and interview expenses o Spouse/significant other's involvement in interview process o District Interview Schedule o Candidate Daily Interview Schedule <input type="checkbox"/> Interview questions are sent to Home Office to be formatted
Prior to 3 rd board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Applicant packets are reviewed by the consultants and reference checks are performed <input type="checkbox"/> Contact candidates on short list and verify their interest in the position <input type="checkbox"/> Meet with stakeholder group chairs to review schedule, procedures and screen questions

Event	McPherson & Jacobson's Tasks
3 rd board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> The consultant facilitates the board's <ul style="list-style-type: none"> <input type="checkbox"/> Review of the list of all applicants <input type="checkbox"/> Overview of candidates on short list <input type="checkbox"/> Selection of finalists <input type="checkbox"/> Finalizing of interview dates & schedule <input type="checkbox"/> Review of interview questions & procedures <input type="checkbox"/> Finalizing candidate & spouse/significant other arrangements <input type="checkbox"/> Contact finalists and schedule interview dates, review schedule, discuss compensation and contractual issues <input type="checkbox"/> Work with Point of Contact to coordinate interviews (transportation, lodging, interview locations, etc.) <input type="checkbox"/> Send Candidate Daily Interview Schedule to each finalist <input type="checkbox"/> Notify the applicants who were not selected to be interviewed
Interviews	<ul style="list-style-type: none"> <input type="checkbox"/> Call Point of Contact after 1st interview to learn how it went <input type="checkbox"/> Call 1st candidate to learn their perspective and how the interview went <input type="checkbox"/> Suggest any possible improvements <input type="checkbox"/> Be available for questions <input type="checkbox"/> Be present at interviews if request is made by school district (additional fee for this service)
Finalist selected and accepted	<ul style="list-style-type: none"> <input type="checkbox"/> Call and make offer to candidate <input type="checkbox"/> Verify acceptance <input type="checkbox"/> Conduct criminal/financial/credential verification check on selected candidate <input type="checkbox"/> Call other finalists <input type="checkbox"/> Sends out letter of congratulations to candidate who was chosen
Phase V	<ul style="list-style-type: none"> <input type="checkbox"/> Facilitate board and superintendent's identification of 2-3 performance objectives and evidence of progress the board will accept <input type="checkbox"/> Consultant reviews superintendent's plan

Port Townsend School District

Event	School District's Tasks
1 st Board Meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Provides consultant with the necessary information to create the brochure; the name of the Point of Contact; and the board member list <input type="checkbox"/> Reviews the brochure
Community meetings are scheduled	<ul style="list-style-type: none"> <input type="checkbox"/> Names and addresses are sent to Home Office for community member stakeholder meeting invitations <input type="checkbox"/> Notifies internal stakeholders of times and locations for stakeholder meetings <input type="checkbox"/> Posts dates, times and locations of meetings and public forum(s) and encourages stakeholder attendance <input type="checkbox"/> Publishes link to online stakeholder input survey
3 rd board meeting	<ul style="list-style-type: none"> <input type="checkbox"/> Board decides if they wish to conduct semi-finalist interviews <input type="checkbox"/> Assist with lodging arrangements and welcome gifts <input type="checkbox"/> Arrange for spouse/significant other tour <input type="checkbox"/> Arrange logistics for stakeholder focus groups
Semi-finalist Interviews	<ul style="list-style-type: none"> <input type="checkbox"/> The board interviews each semi-finalist <input type="checkbox"/> The board determines the finalists to be interviewed
Interviews	<ul style="list-style-type: none"> <input type="checkbox"/> One candidate per day <input type="checkbox"/> Board member greets each candidate upon arrival to district <input type="checkbox"/> Coordinates candidate's meeting with stakeholder focus groups and retrieval of input forms <input type="checkbox"/> Informal interview-social setting <input type="checkbox"/> Formal interview <input type="checkbox"/> Spouse/significant other's visitation is coordinated
Meeting to Select Finalists/ Finalist selected and accepted	<ul style="list-style-type: none"> <input type="checkbox"/> Board members meet and discuss each candidate individually <input type="checkbox"/> Read input forms submitted by stakeholder focus groups <input type="checkbox"/> Individually rank order candidates <input type="checkbox"/> Select minimum of #1 and #2 candidates <input type="checkbox"/> Contact consultant with selection results <input type="checkbox"/> Send interview forms and files to the Home Office <input type="checkbox"/> Board completes an evaluation of the search service provided by McPherson & Jacobson
Phase V	<ul style="list-style-type: none"> <input type="checkbox"/> Superintendent creates plan with target objectives and timelines <input type="checkbox"/> Board adopts plan <input type="checkbox"/> Send copy of plan to Home Office

Investment

The investment for conducting the superintendent search is \$7,000 for Phases I-IV.

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.

Additional Services:

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

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

***Washington Searches Conducted by
McPherson & Jacobson, L.L.C.***

Year	District	School city	Enrollment
2009/10	Aberdeen School District	Aberdeen	3313
2007/08	Arlington School District	Arlington	4950
2013/14	Battle Ground School District	Battle Ground	13000
2011/12	Bellevue School District	Bellevue	18000
2013/14	Centralia School District	Centralia	3400
2009/10	Chehalis School District	Chehalis	2679
2009/10	Chewelah School District	Chewelah	948
2014/15	Chief Leschi Schools	Puyallup	900
2014/15	Chimacum School District	Chimacum	1100
2007/08	Clover Park School District	Lakewood	11879
2012/13	Coupeville School District	Coupeville	1080
2011/12	Crescent School District	Joyce	230
2007/08	East Valley School District	Spokane	4000
2009/10	Eatonville School District	Eatonville	2096
2012/13	Eatonville School District	Eatonville	1800
2009/10	Federal Way Public Schools	Federal Way	21782
2014/15	Kalama Schools	Kalama	990
2013/14	Kelso School District	Kelso	4500
2010/11	Kelso School District	Kelso	5074
2014/15	Kittitas School District	Kittitas	600
2007/08	Kittitas School District	Kittitas	748
2014/15	Longview School District	Longview	6600
2009/10	Lynden School District	Lynden	2793
2013/14	Mary M Knight School District #311	Elma	195
2014/15	McCleary School District	McCleary	280
2012/13	McCleary School District	McCleary	327
2013/14	Morton School District No. 214	Morton	310
2015/16	Mossyrock School District	Mossyrock	530
2011/12	Mount Baker School District	Deming	2000
2011/12	North Kitsap School District	Poulsbo	6500
2008/09	North Thurston Public Schools	Lacey	13500
2009/10	Northport School District No. 211	Northport	162
2010/11	Ocosta School District	Westport	675
2011/12	Olympia School District	Olympia	9000
2013/14	Orcas Island School District	Eastsound	800

Year	District	School city	Enrollment
2008/09	Orting School District	Orting	2100
2015/16	Othello School District No. 147	Othello	4000
2011/12	Port Townsend School District	Port Townsend	1214
2009/10	Rainier School District	Rainier	940
2012/13	Richland Public Schools	Richland	11700
2013/14	Ridgefield School District	Ridgefield	2200
2014/15	San Juan Island School District	Friday Harbor	750
2014/15	Sequim School District No. 323	Sequim	2953
2011/12	Sequim School District No. 323	Sequim	2800
2008/09	Shaw Island School District	Shaw Island	10
2014/15	Shelton School District	Shelton	4115
2010/11	Shelton School District	Shelton	4195
2013/14	Skykomish School District	Skykomish	40
2011/12	Skykomish School District	Skykomish	45
2010/11	South Whidbey School District	Langley	1550
2009/10	Steilacoom Historical School District No. 1	Steilacoom	5727
2013/14	Tenino School District	Tenino	1180
2007/08	Tenino School District	Tenino	1435
2014/15	Tonasket School District	Tonasket	1200
2007/08	Tukwila School District	Tukwila	2558
2014/15	Tumwater School District	Tumwater	6700
2009/10	Tumwater School District	Tumwater	6036
2010/11	West Valley School District	Yakima	4900
2014/15	Wishkah Valley School District	Aberdeen	140

Washington Consultants

Dr. Al Cohen

Retired Superintendent
Olympia, Washington

Dr. Doug Kernutt

Retired Superintendent
Lacey, Washington

Dr. Steven Lowder

Retired Superintendent
Vancouver, Washington

Dr. Nathan McCann

Superintendent
Ridgefield, Washington

Mr. Richard Parker

Board Member
Langley, Washington

Dr. William Dean

Retired Superintendent
Post Falls, Idaho

Ms. Barbara Dean

Retired from AASA
Post Falls, Idaho

Dr. Thomas Jacobson, CEO/Owner

McPherson & Jacobson, L.L.C.
Omaha, Nebraska

Dr. Steve Joel, National Recruiter

Superintendent
Lincoln, Nebraska

Transparency—The McPherson & Jacobson Difference

One of the hallmarks of McPherson & Jacobson, L.L.C. is the belief that the search for a public executive should be conducted with as much transparency as possible. We have designed a process, which keeps the board in complete control of the search, while inviting various stakeholder groups to provide input and become meaningfully involved in the process. The openness of the process has not gone unnoticed. The following articles discussing McPherson & Jacobson’s stakeholder involvement, and editorials from newspapers across the country praising boards for being open, transparent, and doing the public’s business in public.

An open process

“Any government entity wanting to conduct a model search for a high-profile executive would be well-served by the studying the hiring of a new superintendent by the Sioux City Community School District.”...

“As interested, affected observers and taxpayers, residents of the district should appreciate the openness with which the school system approached the stretch run of the search.

The public was provided with specific details about the last stages of the process, all the way through the final decision, which was announced Friday.”...

“When government does not act in proper open fashion, we criticize. Conversely, government deserves credit when it goes the extra mile to provide the public with information it wants and to which it is entitled.

Instead of cloaking its careful, thorough search for a superintendent in dark secrecy as a decision neared, the Sioux City school district opened it to the sunshine of public discourse. As a result, residents of Sioux City can feel comfortable with the choice...*and* with the process by which he was selected.”

Taken in part from the *Sioux City Journal*, April 15, 2008.

www.SiouxCityJournal.com

Open search process, solid choice

“....

“A lot has changed in the Fayette County Public Schools in the eight years since the school board smuggled in a candidate for superintendent under an umbrella to hide his identity from the public.

“The search that just culminated with the hiring of Tom Shelton was as commendable for its openness as that earlier search was memorable for its silliness — and its unfortunate outcome: the winner resigned after just eight months.

“Process does matter. It matters a lot when selecting the leader of a public institution. So, before moving on to the next chapter, the board deserves a shout out for the way this search was managed.

“... ”

“Having been chosen through an open process in which stakeholders had the chance to participate gives him a leg up on gaining that trust and respect. We wish him well.”

**Taken in part from *Open search process, solid choice* | Editorial | Kentucky.com
<http://www.kentucky.com/2011/06/15/1775505/open-search-process-solid-choice.html>**

Wake names three superintendent finalists

“Veteran career educators from North Carolina, Virginia, and Texas are the three finalists vying to replace Tony Tata as superintendent of Wake County school system.

“... ”

“The three will meet with the public at a forum scheduled for Tuesday. The board will interview them the next day with the final vote possibly coming during the June 4 meeting....

“.... ”

“Not since 1995 had the school board released the names of the finalists for superintendent. McPherson & Jacobson, the Nebraska-based search firm hired by the board, said that naming the finalists and having them meet with the public would make the process more transparent and lead to greater public support when the board makes its choice.

“The school board reviewed 23 applications, ultimately choosing semi-finalists who were on a short list recommended by the search firm. The board interviewed the four semi-finalists last week.

“... ”

**Taken in part from
www.newsobserver.com/2013/05/22/2908354/wake-names-superintendent-finalists.html
May 22, 2013**

Superintendent hiring process involves significant cross-section of G.I. [Grand Island]

“The Grand Island school board, and in fact the entire community, is in the midst of an extremely important process. That is selecting a new school superintendent.

The school board has set up a very open process in which each of the four finalists are coming to Grand Island this week for a full day, visiting with teachers, school officials, community members, business people, the media and being interviewed by the school board.

While it certainly makes for a full week, it is a good process that allows a variety of community members an opportunity to meet the finalists and give their input on the selection.

...

...The board has also taken the important step of opening the process to the community, rather than just keeping it among board members.

It’s important that the school board receive input from as much of the community as possible. Ultimately, it will be the board’s decision on whom to hire, but involving the community in the process was a wise move.

The timing of the selection of the finalists and the interviews also have been good. The Grand Island board is going through the process early enough in the school year so that whomever they select won’t be leaving their current school district in a lurch in finding a new superintendent.

...”

**Taken in part from *The Grand Island Independent*, December 1, 2010.
Grand Island, NE**

Opinion

“We ... want to salute the five school board members for the open and inclusive process they followed in narrowing the field of candidates and reaching out to the North Thurston community to come to the best choice [new superintendent] for the district and its 13,500 students.”...

“It was an excellent, open and transparent superintendent selection process and the board members deserve credit not only for the process but for listening to their community.”

Taken in part from *The Olympian*, April 8, 2009

An open superintendent search process is good for the community

“Now that the search is on for a candidate [superintendent], I believe the entire process could not be in better hands [McPherson & Jacobson]...When the CCEA [Culpeper County Education Association] executive board members met with them [McPherson & Jacobson], my first impression was one of complete relief.”...

“They [McPherson & Jacobson] explained that before any candidates come before the School Board, they will be vetted with deep background checks and will be matched up with the profile for the CCPS [Culpeper County Public Schools] position. Each candidate will not only be thoroughly interviewed by the School Board, but also will have a chance to meet with stakeholders before the final decision is made.”...

“...I commend the board for its decision to contract with McPherson and Jacobson to handle our superintendent search.

This is not just a corporate head-hunting firm seeking a field of generic candidates.”...

“The fact that the process had complete transparency is good for all stakeholders.”

Taken in part from Walker, Jeff, 2009. *Culpeper Star Exponent*, February 4

Conducting a super search

“We don’t know who will ultimately be selected to lead the South Bend Community School Corp. into the future, but we—and indeed the public—know plenty about the process leading up to the hiring of the next superintendent.

“...So far, the search has been transparent. It has been inclusive, not merely accepting public input, but firmly demanding it.

“... ”

“From the start, members of the public were included in the search. A citizen advisory committee was formed and charged with soliciting input from community members about the challenges and strengths of the district, and the qualities the next super should possess.

“... ”

“The search also included 29 community forums, in various locations across the community, for the public in general, as well as such specific groups as teachers, not-for-profits and government boards.

“In short, the process of finding South Bend’s schools chief has been a model for how such a search ought to be conducted...”

“... ”

Taken in part from
southbendtribune.com/news/opinion/sbt-20111103sbtmicha-07-04-20111103,0,58885628.story

Board of Education Scores New Superintendent

“The process to find the new super [superintendent for the Marshalltown Community School District] was done in collaborated fashion over three months which included hiring the search firm McPherson & Jacobson to collect applications and put them through vigorous interviews in order to narrow the field to five finalists. In the home stretch, several focus groups (represented by community members, parents, teaching staff, students, businesses, central office staff, and building administrators) interviewed the five candidates in five days before the board rendered its choice Saturday afternoon....

“...remarked Macmillan [Board President Adrienne Macmillan] ‘The expertise and professionalism that McPherson & Jacobson brought into this process was phenomenal. They really made themselves an extension of our educational community and worked with us in a very detailed level to help work through our selection criteria. It really made our job very easy in the fact that we got 18 total candidates at this time of the year and with the vast majority having solid superintendent experience, it is a credit to their firm.’

“In all, the Board was pleased how the community and focus groups rallied around choosing the new leader, exhibiting a team effort, as well as spirit. Macmillan concluded. ‘It truly demonstrates that whole adage about how it takes a village to raise a child, and this was it.’”

Taken in part from Lawson, Tammy. *The Marshall County Sun*, May 15, 2008.

West Central’s Openness a Model

“When the West Central School District recently made public the names of five finalists to replace retiring Superintendent David Fischer, it represented a high water mark in open government.

No muss. No fuss. Just, ‘Here they are.’

Flash back to last year, when the Sioux Falls School District was trying to replace retiring Superintendent Jack Keegan. Lengthy School Board discussions on confidentiality and corrupting the process. Worries about the effect on job candidates—more important, apparently, than parents and taxpayers.

In the end, the board was dragged kicking and screaming into a small measure of openness.

How different in the West Central district. Simply, ‘Here they are.’ ”

Taken in part from *The Argus Leader*, February 15, 2005. Sioux Falls, SD

Public or Secret: Districts Hire Top Leaders Differently

“Davenport, Iowa—Local school boards have been put to the test: pick a superintendent in the light of day or do it behind closed doors. When hiring a new leader in Iowa, it’s ultimately school board members who decide whether to involve the community that elected them.”...

“In the North Scott School District, board members decided to ... conduct their search in secret. Next door, the Bettendorf school board opted for another route: transparency. ... In Bettendorf’s case, the board made its final selection with input from an informed public that knew the candidates and their backgrounds.”...

“ ‘One of the arguments is that no one will apply if we do it publicly,’ said Charles Davis, executive director of the National Freedom of Information Coalition. ‘I guess that was refuted by the fact that you did have candidates for both jobs. There is not a (bit) of evidence out there supporting that thesis.’

From the beginning, Ray and Associates, the search firm hired by North Scott... promised applicants confidentiality, some finalists said. McPherson & Jacobson, a search firm hired by Bettendorf...told candidates the process would become public once the board selected finalists. Despite their different approaches, both attracted dozens of candidates from across the country. Both searches, members in Bettendorf and North Scott said, ended in the hiring of a qualified candidate.

Those who favor more open searches say the promise of confidentiality doesn’t dissuade a majority of applicants. Instead, it allows parents and other residents an opportunity to take part in the selection process, they said. ‘The people in Bettendorf know whether or not the applicant pool was diverse,’ Davis said. ‘They know whether the applicant pool was filled with experienced or inexperienced candidates. They know whether an insider candidate was rejected for an outsider candidate. They can compare one person’s resume against another. In North Scott, we don’t know anything, and we never will. There is certainly something that gets lost in that.’ ”...

“...The board [Bettendorf] decided early in the process after consulting with McPherson & Jacobson to keep the process open, something the search firm supported, said Wayne Rand, a search consultant for McPherson & Jacobson. To accommodate the board members’ decision, the district held public forums for each finalist so residents who wanted to could attend.

The board wanted to send a clear message that ‘the stakeholders’ input was valued,’ said Judy Miller, human resources director for Bettendorf. ‘There is no reason to keep that information from the public. They are interested in knowing who we are looking at and why.’

Rand said his experience in Bettendorf isn’t unique. Instead, every school board he’s dealt with during superintendent searches in Iowa has kept the process open for the public. And, each time, his search firm was able to land a large pool of qualified candidates... Taxpayers are interested in knowing because of the money being spent. If you exclude people, it’s natural that they feel left out, and they want to be involved in something like this.

Taken in part from *The Quad City Times*, March 9, 2009

Editorial

“Being involved in the search process for the new superintendent for Culpeper County Public Schools puts me a position that I do not mind being in. It is not a position of power, but I am involved, as are the other employees of CCPS and the community.”...

“...McPherson and Jacobson’s representatives...began the process of finding out what the School Board and other stakeholders were looking for, finding and vetting the potential candidates and presenting the narrowed field to the board.”...

“During this process, to my knowledge, the Culpeper County School Board has followed the recommendations of McPherson and Jacobson very closely. I believe they did this out of a sense of the importance of the situation and a respect for the professionals they charged with carrying out the task of helping match up a superintendent with our school system.”...

“...This executive search firm has either completed or is in the process of approximately 40 searches in 11 states for superintendent and other top administrators.”...

“Remember a school superintendent is not an elected official; he or she serves at the will of a School Board. The Culpeper County School Board has involved various segments of the school division and the public in the process. Veteran teachers who have been in Culpeper long enough to have worked under more than one superintendent have said the current process is the most open they have seen. By the end of this week, many individuals will have had a chance to see and hear and interact with the five candidates. Their input will be looked at. But, ultimately, the decision of whom to hire rests solely on the shoulders of the members of the elected School Board. That is one of the basic tasks of a School Board.”...

“Don’t we owe it to the 8,317 individuals under their [the new superintendent] leadership the opportunity for the process to find the right person for the job? And shouldn’t the manner in which we find the new superintendent be open and honest and without premature judgment?”

Taken in part from Walker, Jeff, 2009. *Culpeper Star Exponent*, April 1

Wake wise to announce superintendent final

“The Wake County school board is looking for a new superintendent of schools. Whether it will make the right choice remains to be seen, but it bodes well that it’s making the choice right away.

“The board, following the advice of its search firm, McPherson & Jacobson, has agreed to publicly identify its two or three finalists for the job of leading the state’s largest school district. The final candidates won’t only be named, they’ll come to Wake County and meet with the public.

“What a refreshing and sensible change from the secrecy that has surrounded the selection of new superintendents.....

“....”

**Taken in part from
www.newsobserver.com/2013/05/13/2890369/wake-wise-to-announce-superintendent.html
May 13, 2013**

Superintendent—District hires firm to assist in search; student provide input through student interview panel

“... The Board of Education...chose to hire the executive recruiting and development service, McPherson and Jacobson, to find Westside’s next leader.

“ ‘The board, in an open meeting, defined what we saw as our key objectives—what are the criterial? What are the qualities we would like to see in our next superintendent?’ said Scott Hazelrigg, one of the directors on the Board of Education... ‘McPherson and Jacobson used the criteria the board established and the Stakeholders input report to select certain individuals to encourage applying.

....

“From Jan 16-20, Westside hosted the five finalists of the superintendent search for a series of interviews. Each day, a different candidate was welcomed into the Westside community by a coffee with school board members. The candidates then went on to participate in interviews with students, community members, teachers, administrators and the Board of Education.

...

“Though the board will ultimately make the decision about who the next superintendent will be, students received the opportunity to be involved in the process.

“ ‘One of the things we liked about the consultant was that they historically engaged a student group in the process,’ Hazelrigg said.

“Every morning a small group of juniors and seniors gathered in the conference room to meet the candidates....

“The questions the student panel asked included, ‘Why/how do you feel the input from the students is necessary when making choices?’ and ‘How do you make sure all students’ needs are met with so much diversity?’

“Junior Maddie Ryan led the student panel. Ryan prepared for the interviews by compiling questions suggested by the search firm in addition to those students requested, and doing preliminary research on the candidates.

“ ‘I think that it’s a really great opportunity that they are asking students, and I hope that whoever the superintendent is will continue to have student involvement,’ Ryan said.

“During the interviews, all students were engaged by asking candid questions and diligently taking notes.

“ ‘Everyone is pretty engaged; they are asking intelligent, thoughtful questions,’ Ryan said.

“...Other focus groups include teachers, key community members and members of the Westside Foundation.

“The student interviews allowed the board not only to get insight into what the students thought of the candidates, but also provided the candidates with an opportunity to hear from the students.

“ ‘There aren’t any adults here, which is really nice because I think students are more open, and I feel the candidates are more receptive because you’re not worried about what sounds good or what would offend someone,’ Ryan said.

“ ‘I think it gives [the candidates] really good insight, and us a really good insight too,’ Ryan said.”

Taken in part from Goodman, Maddie, Westside *Lance*, Spring 2012

A Community Effort for a Community Superintendent FIRM DECISION

District hires unbiased executive search firm

“The school district hired the firm McPherson and Jacobson to assist in the search for our next superintendent. The firm specializes in executive searches and has helped with both the advertising and interview processes.

...

“Five different panels—a student, Westside Foundation, volunteer, teacher and administrative panel—interviewed each candidate separately.

“All five panels submitted a formal write-up detailing their opinions of the five candidates. The school board will take the panels’ opinions into consideration when making the final decision.

...

“...we believe hiring an experienced firm to help with selecting our next superintendent was a great idea

“McPherson and Jacobson was responsible for bringing in 28 candidates from all over the country, giving the district greater variety than it would have had choosing a superintendent internally.

“The firm also oversaw a more extensive selection process. It suggested the district create the five panels to interview each candidate, helped choose the panels and provided questions the panels should ask the candidate.

“The superintendent deals with the entire community, so it is only logical that the decision is a community effort.

...

“ ‘[The school board] gained a student opinion, a thoughtful, careful consideration of us and what we want in a superintendent, which they can’t always get themselves,’ senior and student panelist Jacob Lehr said.

“This process allowed each group to offer its unique perspective and will encourage the school board to choose a well-rounded candidate.

...

“In addition, this extensive process will hopefully produce an unbiased decision.

“ ‘I was very pleased with how with how it went,’ [Principal Maryanne] Ricketts said. ‘I like how all the Stakeholder groups were involved. I liked that we had a student group who met with each candidate. Everybody took this very seriously. The groups gave the school board good feedback.’

“Every part of the process went through the firm, and, as a result, the process went smoothly.

“The *Lance* believes the school board made the correct decision in hiring McPherson and Jacobson to assist in the superintendent search.”

Taken in part from Westside *Lance*, Spring 2012

Report details what community members want in new Elk Grove district superintendent

Residents, teachers and students in the Elk Grove Unified School District are all looking for the same characteristics in a new superintendent, according to report from McPherson & Jacobson LLC, an executive search firm hired by the district.

They want someone who is collaborative, culturally competent, approachable, has integrity and strong communication skills and is visible at schools. They also want someone who can lobby for legislation, policy and resources at the state and federal level, according to the report.

...

The report, compiled from more than 20 meetings with community members and stakeholders, was distributed to board members and others at a school board workshop Wednesday afternoon.

“It’s a good process – to get a feel for the community, employees and students,” said board President Priscilla Cox.

The report also says that stakeholders are in sync about issues at the district that they would like a new superintendent to know about. They list the achievement gap at the top of their list of concerns, as well as institutional racism and equity in the distribution of resources between schools.

They want the new superintendent to know that there is a split on the school board that makes it difficult for staff to work with trustees and that there is a need to re-establish trust between the administration and staff, according to the report.

The report will be used to help select a superintendent and will be distributed to the candidates so they can understand the community’s needs, said Bob Ferguson, a consultant for McPherson and Jacobson LLC. The new superintendent also will receive a copy as a guide to taking the helm of the district.

The process is very effective, said William Huyett, a consultant for McPherson and Jacobson. By the third or fourth meeting, common themes began to emerge.

“It’s a healthy thing to talk to your stakeholders and to find out what the issues are,” Huyett said.

The school board adjourned to a closed session with the expectation that it would identify finalists for interviews that will begin Friday.

...

The entire board will conduct formal interviews of candidates in closed sessions. Interviews could continue Monday if the board selects more than four finalists. Representatives of employee, district and community organizations have also been selected to participate in the interviews.

**Taken in part from Lambert, Diana, *Sacramento Bee*,
Wednesday, Sep. 3, 2014 - 9:30 pm**

Fayette school board might announce superintendent finalists Tuesday

“The search for a new Fayette County Public Schools superintendent is entering its final, crucial phase, and the names of finalists for the post could be revealed Tuesday night.

“...

“...McPherson & Jacobson, the schools’ superintendent search firm, plans to notify probably finalists to stand by for calls Tuesday night, so notifying those selected could take only a few minutes. That would allow the board to make the names public soon after members make their decisions.

“....

“Board members plan to bring each finalist to Lexington for tours of the school district; interviews with the board, meetings with education, civic groups and the media; and a session with the public. One finalist would visit each day of that process.

“....”

Taken in part from
<http://www.kentucky.com/2011/05/31/1758135/fayette-school-board-might-announce.html>
June 2, 2011

From: Nancy VanBeek [<mailto:NVanBeek@WashingtonPavilion.org>]
Sent: Wednesday, November 29, 2006 4:24 PM
To: t_jacobson@macnjake.com
Subject: Thank you

Mr. Jacobson

Thank you so much for your time with us yesterday. The meeting was (surprisingly enough) enjoyable and the way you were able to draw out our ideas, insecurities, needs and wishes. The meeting once again gave me hope for the future of the work we do here.

I look forward to meeting the candidates you feel will be able to meet our varied needs and I am very grateful that you will be with the new Director as he/she takes the position. This transition time will be made much easier with a mentor to provide insight into all the different expectations of the position.

Thank you for being a good listener and a super facilitator.

Nancy Van Beek
KSDC Education Manager
Washington Pavilion of Arts and Science
301 S. Main Ave.
Sioux Falls SD 57104
(605_ 367-7307 ext 2374
www.washingtonpavilion.org

From: Laura Bednar

Sent: Thursday, December 20, 2007 12:05 PM

To: t.jacobson@macnjake.com

Subject: thank you

Dear Dr. Jacobson

.....

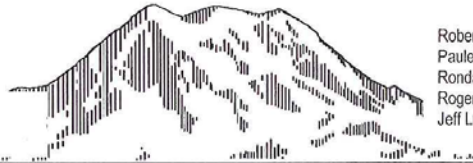
Your company has been extremely helpful to me as I have stepped into the superintendency, and I certainly recommend McPherson and Jacobson to anyone that I can! More than anything else, I have no doubt that the follow-up work that is done with School Boards and Superintendents is the most essential piece. I cannot thank you and your consulting team enough for how your leadership and guidance has truly turned our district around! I wish every school district had the opportunity to experience what we have with McPherson and Jacobson.

Thank you again,

Laura Bednar
Superintendent
Stuttgart School District

***What Board Members Say About
the Service of McPherson & Jacobson, L.L.C.***

**EATONVILLE
SCHOOL DISTRICT**
Superintendent Rich D. Stewart



Robert Homan, President
Paulette Gillardi, V-President
Ronda Litzenberger, Director
Roger Andrascik, Director
Jeff Lucas, Director

Together, we commit to excellence in education and preparation for life.

June 21, 2013

Dr. Thomas Jacobson
McPherson & Jacobson
7905 L Street Suite 310
Omaha NE 68127

Dear Dr. Jacobson,

My name is Robert Homan and I am the School Board President with the Eatonville School District. I just wanted to drop you a note of extreme satisfaction about, Al Cohen and Mike Boring, two of your consultants. We have enlisted their services twice now in the last three years and I wanted to let you know what outstanding individuals they are and what a pleasure it has been to work with them!

Al and Mike impressed our Board with their knowledge of the process in hiring a qualified Superintendent. Their ability to advise us on timelines, qualities to look for and experience levels that will work well in our district was invaluable. Finally their professionalism is unmatched when it comes to their ability to work with people and understand perspectives. Their skills to assimilate information and to apply that information to attain the best outcome for the needs of our district was impressive.

Needless to say, that we are and were very happy with the candidate pool along with the selections we have made for our Superintendents of Eatonville Public Schools. I would have no problem recommending either one or both of these men to any District looking for consultants for this process.

We will definitely keep your firm at the top of the list when it comes to consulting on this and any other pertinent service you offer.

On behalf of myself and the rest of the Board of Eatonville School District, we wish to express our appreciation.

Respectfully,

Robert Homan
Board President
Eatonville School District #404

Equal Employment & Educational Opportunities • Eatonville School District #404 • PO Box 698 • Eatonville, WA 98328 • Telephone
(360) 879-1000 • Fax (360) 879-1086



LITTLE ROCK SCHOOL DISTRICT

OFFICE OF THE SUPERINTENDENT

March 1, 2013

Dr. Thomas Jacobson
McPherson & Jacobson, LLC
7905 L Street, Suite 310
Omaha, NE 68127

Dear Dr. Jacobson:

On behalf of the Little Rock School District Board of Directors, I would like to thank you for the professional manner in which the search process for our next superintendent has been conducted. I commend our lead consultant, Ms. Loe Dunn, and her assistants, Dr. Kieth Williams and Dr. John Smith, for guiding us through the process of selecting and interviewing our next leader.

I would recommend your organization to anyone who requires the services of an executive firm to coordinate their search process.

Again, thank you for the professionalism demonstrated by your team. Your service has been invaluable to us.

Sincerely,


Dianne Curry, President
LRSD Board of Directors

Date: Wednesday, September 26, 2012, 10:33 PM

“....

“The entire process of a Superintendent search firm from start to finish has been a learning experience for me and I strongly believe it was made easier because of your knowledge, expertise, just being excellent to work with as well as the over professionalism of the firm.

“Again, thank you for all the assistance you provided to our district...”

Thanks,
Connie McElyea
Moline [Illinois] Board of Education



Reynolds School District
Administration Offices
1204 NE 201st Avenue
Fairview, OR 97024
503.661.7200 • FAX 503.667.6932

April 26, 2012

To Whom It May Concern:

I am the Chair of the Reynolds School District, serve on the Board of a non-profit Women's Shelter, am a Consumer Arbitrator, a very active community advocate, and have extensive Executive and Human Resource Management experience. I am compelled to write on behalf of the firm McPherson & Jacobson's Executive Search Consultant Services.

This year our district contracted with the McPherson & Jacobson to conduct a national search to replace our retiring Superintendent. As promised, they delivered excellent, comprehensive services from start to finish. The fact that we were assigned a senior partner and two regional consultants created synergy and success in the process. Their multi-pronged protocols ensured that all stakeholders both internal and external experienced high levels of confidence in both the process and the outcome.

The range and quality of the service delivery was superior. From facilitating widespread community input for design and delivery of a professional search brochure, to national advertising, screening committee management, a survey, stakeholder forums and press releases our board, staff and community strongly supported the process and are very satisfied.

The individuals assigned to us were Dr. Tom Jacobson, Dr. Bill Dean and Mr. Rich Parker. Their varied skills and years of educational experience is an excellent match for any district. They spent tireless hours of support to address staff, citizen and community involvement concerns. They innovatively united diverse processes and combined their energies to accomplish our goals on an extremely tight timeline during a difficult time for our district. Through it all they remained highly organized, exhibited excellent verbal, written and interpersonal skills, while remaining versatile and reliable. Their services were not only strategic but enthusiastic, effective and solution oriented. They delivered results.

In conclusion, their professional services combined with a caring style made our search robust and effective. Your organization would be fortunate to have them provide the same service.

Please share this information with any parties that are interested or may affect decisions regarding this matter. If you require elaboration, please feel free to contact me. I would be happy to share more information.

Respectfully,

Theresa Delaney Davis

Theresa Delaney Davis
Chair

A great place for learning.

www.reynolds.k12.or.us/schools/

Great Valley School District

47 Church Road
Malvern, PA 19355
Phone 610-889-2100, ext. 2112
www.gvsd.org



BOARD OF SCHOOL DIRECTORS

November 10, 2009

Mr. Tom Jacobson
McPherson & Jacobson, LLC
7905 L St., Suite 310
Omaha, NE 68127

Dear Tom:

I wanted to take a moment to offer my sincere appreciation for all your help in our recent superintendent search.

While hiring a superintendent may be a Boards' most important responsibility, it isn't something any of us do on a regular basis if ever at all. I can't imagine trying to make our way through this without your guidance. You brought us a process that was able to meet the needs of our community. You told us to trust the process, we did, and it worked.

On behalf of the Board and the entire District, I want to extend our thanks to you and all your colleagues at McPherson & Jacobson for a job well done.

Sincerely,

Beth McGarrigle
Board President

From: Zweiback, Rose [<mailto:zweibackr@unmc.edu>]
Sent: Monday, November 05, 2012 8:25 AM
To: Thomas Jacobson, Ph.D.
Subject: Testimonial

Working with McPherson & Jacobson made our superintendent search a smooth and organized process. Our consultants were our partners. We set the parameters and the goals and they provided the expertise. We wanted the search to invite input from our stakeholders and involve them as much as possible. At the same time, the board had full responsibility for the selection.

I found the consultants from McPherson & Jacobson to be outstanding professionals who provided services of the highest quality. They presented our board with a slate of excellent candidates and then let us do the work of interviewing and selecting the best choice for our district. We appreciated their work, especially the follow-up services in setting evaluation goals for our new superintendent.

I heartily endorse McPherson & Jacobson.

Rosie Zweiback

Vice President

Westside Community Schools Board of Education

Rzweiback@weatside66.org



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 ♦ WEBSITE: WWW.MACNJAKE.COM

Comments/references from Westside Community Schools, Omaha, Nebraska

November 6, 2012

*Dr. Thomas Jacobson
McPherson & Jacobson, LLC
7905 L Street, Suite 310
Omaha, NE 68127*

Dear Tom:

McPherson & Jacobson's guidance and support were invaluable throughout Westside Community Schools' superintendent search in 2012. Time and perspective have enabled me to identify what for me were your most important contributions to the process.

- ***Focus:*** *The Board discussion and consensus on the key attributes to be sought in candidates for our position - a key step in McPherson & Jacobson's recommended process - maintained the focus of the search on the Board's top priorities.*
- ***Responsiveness:*** *McPherson & Jacobson responded to our requests for assistance, predictable or last minute, in a timely and professional manner.*
- ***National Reach:*** *The benefits of your national network of consultants were evident both in the field of candidates you were able to access as well as in your ability to vet those candidates effectively.*
- ***Integrity:*** *Superintendent searches are notoriously stressful for school boards. McPherson & Jacobson dealt with the difficult and unexpected turns in the process with unwavering integrity and professionalism.*

Although my term on the Westside School Board concluded prior to our new superintendent taking office, by all reports he has distinguished himself already in the first few months of what will hopefully be a long tenure. It is no exaggeration to say that we could not have found such an outstanding and experienced leader without you. My sincere thanks to you and Dr. Randy Nelson for your support.

Best regards,

Kathleen Bradley

June 3, 2014

To Whom It May Concern:

I am writing this letter on behalf of Drs. Don and Molly Helms. We recently hired them through your firm to aide us in our search for a superintendent for the Winship-Robbins Elementary School District. The search started in mid March and concluded in late April with the successful hiring of Dr. Laurie Goodman.

Throughout the process Don and Molly Helms were professional, well informed, and organized. What started out as a seemingly daunting task proved to be efficient, manageable, and rather exhilarating. We felt the list of questions thoroughly covered our needs and the timeline was smooth. The advertising certainly attracted more applicants than we would have been able to accomplish on our own. Don and Molly also recruited which brought in one particularly good candidate. Their screening of applicants streamlined our job. We felt confident with their guidance and appreciated their commitment to helping us achieve our important goal.

We look forward to the new school year with the confidence that comes from feeling we have hired the right superintendent to serve the needs of our entire school community. Our sincere thanks go to Don and Molly for their valuable contribution.

Sincerely,

Winship-Robbins Elementary School Board

Hassan Mohsen, President

Janet Alonso, Clerk




Applicant Diversity

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

Over 25 percent of McPherson & Jacobson consultants are minorities or female. We use our consultant network to track the careers of successful administrators. We also work closely with universities, colleges, and professional organizations that represent and promote minority and female applicants.

McPherson & Jacobson's minority/female placements are listed below:

<u>Search Year</u>	<u>School District/Entity</u>	<u>Person Placed</u>
2014-2015	Birmingham City Schools, AL	Dr. Kelley Gacutan
2014-2015	Cherokee Community School Dist., IA	Ms. Kimberly Lingenfelter
2014-2015	Chief Leschi Schools, Puyallup, WA	Dr. Amy Eveskcige
2014-2015	Colts Neck Township Schools, NJ	Ms. Mary Jane Garibay
2014-2015	Conejo Valley Unified School District Thousand Oaks, CA	Dr. Ann Bonitatibus
2014-2015	El Monte Union High School Dist., CA	Dr. Irella Perez
2014-2015	Gustine Unified School District, CA	Mr. William Morones
2014-2015	Hot Springs School District, AR	Mr. Mike Hernandez
2014-2015	San Juan Island School District Friday Harbor, WA	Dr. Danna Diaz
2014-2015	Sunnyside Unified School District Tucson, AZ	Mr. Steven Holmes
2014-2015	Unity Charter School, Morristown, NJ	Ms. Connie Sanchez
2014-2015	Watson Chapel School District Pine Bluff, AR	Dr. Connie Hathorn
2013-2014	Arkansas Arts Academy(Benton County School of Arts), AR	Mrs. Mary Ley
2013-2014	Caddo Parish Public Schools Shreveport, LA	Dr. Theodis Lamar Goree
2013-2014	Centralia School District, WA	Mr. Mark Davalos
2013-2014	Fallbrook Union High School District, CA	Dr. Hugo Pedroza
2013-2014	Gardner Public Schools, MA	Ms. Denise Clemons
2013-2014	Hermitage School District, AR	Dr. Tracy Tucker
2013-2014	Mary M. Knight School Dist., WA	Dr. Ellen Perconti
2013-2014	Winship-Robbins Elem. Schools, CA	Dr. Laurie Goodman
2013-2014	Valley Springs School Dist., AR	Ms. Judy Green
2012-2013	Clarke Comm. School District, IA	Ms. Bonita Gonzales
2012-2013	Eatonville School District, WA	Ms. Krestin Bahr
2012-2013	Galena Unit School District #120, IL	Dr. Sharon Olds
2012-2013	Goshen County School District Torrington, WY	Ms. Jean Chrostoski

2012-2013	Hot Springs School District, SD	Mrs. Danielle Root
2012-2013	Ladue Schools, St. Louis, MO	Dr. Donna Jahnke
2012-2013	Laguna Dept. of Education, NM	Mr. Emmanuel "David" Atencio
2012-2013	Little Rock School District, AR	Dr. Dexter Suggs
2012-2013	McCleary School District, WA	Ms. Tita Mallory
2012-2013	Santa Fe Indian School, NM	Mr. Roy Herrera
2012-2013	Texarkana School District, AR	Mrs. Becky Kesler
2011-2012	Bainville School, MT	Mrs. Renee Rasmussen
2011-2012	Duval County Public Schools Jacksonville, FL	Mr. Nikolai Vitti
2011-2012	Jenks Public Schools, OK	Ms. Stacey Butterfield
2011-2012	Magnet Schools of America, DC (Executive Director)	Mr. Scott Thomas
2011-2012	North Kitsap School Dist., Poulsbo, WA	Ms. Patrice Page
2011-2012	Polson School District, MT	Dr. Linda Reksten
2011-2012	Reynolds School District, Fairview, OR	Mrs. Linda Florence
2011-2012	Skykomish School District, WA	Ms. Edwina Hargrave
2010-2011	Bogalusa City Schools, LA	Ms. Louise Smith
2010-2011	Chapman USD 473, KS	Mrs. Lacey Sell
2010-2011	Danville Public Schools, AR	Mr. Miguel Hernandez
2010-2011	Jefferson County School District, Louisville, KY	Dr. Donna Hargens
2010-2011	Little Rock School District, AR	Dr. Morris Holmes
2010-2011	Ocosta School Dist., Westport, WA	Dr. Paula Akerlund
2010-2011	Orange County, Orlando, FL	Dr. Barbara Jenkins
2010-2011	Pine Bluff Public Schools, AR	Mr. Jerry Payne
2010-2011	Seaford School District, DE	Dr. Shawn Joseph
2010-2011	South Bend Comm. Schools, IN	Dr. Carole Schmidt
2010-2011	South Whidbey School District, Langley, WA	Dr. Josephine Moccia
2010-2011	Stuttgart Public Schools, AR	Dr. Melvin Bryant
2010-2011	Sumner County Educational Services Interlocal District #619, KS	Ms. Heather Bristor
2010-2011	Whitefish School District, MT	Ms. Kathryn Orozco
2009-2010	Clark County School District Las Vegas, NV	Mr. Dwight Jones
2009-2010	Faith School District, AR	Ms. Elsie Baye
2009-2010	Monroe City Schools, LA	Dr. Kathleen Harris
2009-2010	Searcy School District, AR	Ms. Diane Barrett
2009-2010	Vicksburg-Warren, MS	Dr. Elizabeth Swinford
2008-2009	Blair Community Schools, NE	Dr. Jane Stavem
2008-2009	Central Dauphin School District, PA	Dr. Luis Gonzalez
2008-2009	Culpeper County Schools, VA	Dr. Bobbi Johnson
2008-2009	Dubuque CSD, IA	Dr. Larie Godinez
2008-2009	Greenville School District, MS	Dr. Harvey Franklin
2008-2009	Ipswich School District, SD	Ms. Beverly Myer
2008-2009	North Thurston Schools, Lacey, WA	Mr. Rajinder Manhas

2008-2009	Northland ISD #118, Remer, MN	Ms. Theresa Meyers
2008-2009	Orting School District, WA	Ms. Michelle Corker-Curry
2008-2009	St. John the Baptist Parish, LA (asst. supt. position)	Dr. Leigh Ann Beard
2007-2008	Arlington School District, WA	Dr. Kristine McDuffy
2007-2008	Clover Park School District, WA	Ms. Debbie LeBeau
2007-2008	East Union CSD, IA	Ms. Pam Armstrong-Vogel
2007-2008	PCM CSD, Prairie City, IA	Ms. Jane Hartz Babcock
2007-2008	Radnor Township, PA	Dr. Linda Grobman
2007-2008	St. John the Baptist Parish, LA	Dr. Courtney Millet
2007-2008	Selma City Schools, Selma, AL	Dr. Austin Obasohan
2007-2008	Shaw Island School District, WA	Dr. Marie Phillips
2007-2008	Tukwila School District, WA	Ms. Ethelda Burke
2007-2008	Wynne School District, AR	Dr. Benjamin Perry
2006-2007	Anselmo-Merna Schools, NE	Ms. Sue McNeil
2006-2007	Bondurant-Farrar CSD, IA	Ms. Peggy Huisman
2006-2007	Chariton CSD, IA	Ms. Paula Jo Wright
2006-2007	East End, AR	Ms. Myra Graham
2006-2007	East Grand, Granby, CO	Ms. Nancy Karas
2006-2007	Hot Springs, AR	Ms. Joyce Craft
2006-2007	Rochester School District, MN	Dr. Romain Dallemand
2006-2007	Todd County School Dist., SD	Dr. Margo Heinert
2006-2007	Washington Pavilion of Arts & Science, Sioux Falls, SD	Ms. Mary Guerra
2005-2006	Garden County Schools, NE	Dr. Paula Sissel
2005-2006	Madison Parish, LA	Mr. Michael Johnson
2005-2006	Pulaski County School Dist., AR	Mr. James Sharpe
2005-2006	Rapid City Catholic Schools, SD	Ms. Barbara Honeycutt
2004-2005	Fordyce Public Schools, AR	Ms. Pam Blake
2004-2005	Holdrege Public Schools, NE	Ms. Cynthia Wendell
2004-2005	Intermediate School District 287, MN	Ms. Sandra Lewandowski
2004-2005	Lyons USD #405, KS	Ms. Anne Lassey
2004-2005	Madison Parish, Tallulah, LA	Mr. Michael Johnson
2004-2005	Stuttgart School District, AR	Dr. Laura Bednar
2003-2004	Banner County, NE	Ms. Lana Sides
2003-2004	Davenport CSD, IA	Mr. Julio Almanza
2003-2004	NE CAP Exec. Dir., KS	Ms. Jackie Hangley
2003-2004	Wagner, SD	Ms. Susan Smit
2002-2003	Carlsbad, NM	Ms. Charlotte Neill
2002-2003	Hope, AR	Mr. Thomas Muldrew
2002-2003	Humboldt CSD, IA	Ms. Joyce Judas
2002-2003	Newcastle, NE	Ms. Vickie Caldwell
2001-2002	Iroquois School Dist., SD	Ms. Lori Wehlander
2001-2002	Parsons, KS	Dr. Deborah Perbeck
2001-2002	Plattsmouth School District, NE	Mrs. Renee Jacobson
2001-2002	Walnut Grove R-V, MO	Ms. Tanya Hunter
2000-2001	Texarkana, AR	Ms. Katherine Lease

1999-2000	Bison School District, SD	Ms. Sharon Soehren
1999-2000	Montrose School Dist., SD	Ms. Mary Austad
1997-1998	Ralston, NE	Dr. Virginia Moon
1997-1998	Randolph, NE	Dr. Marlene Uhing
1994-1995	Clarks, NE	Ms. Delores Raider