



**BOARD OF TRUSTEES
SPECIAL MEETING
AGENDA**

September 30, 2021

**1:00 p.m. Open Session
Closed Session to Follow**

Participating School Districts: Huntington Beach Union / Irvine / Newport-Mesa / Saddleback Valley / Tustin Unified

Board of Trustees: Diana Carey / Lauren Brooks / Michelle Barto / Barbara Schulman / Lynn Davis





TO: Board of Trustees
FROM: Carol Hume
DATE: September 27, 2021
SUBJECT: Board Package

Enclosed are the agenda and supporting materials for the September 30, 2021, special Board of Trustees meeting. The board meeting will begin with an open session at **1:00 p.m.** We will adjourn to closed session immediately following open session to discuss the public employee appointment for the position of superintendent.

I am looking forward to seeing you on Thursday, September 30.

Enclosure



BOARD OF TRUSTEES

**Special Meeting
September 30, 2021
1:00 p.m. Open Session
Closed Session Immediately Following**

NOTICE OF VIDEO/TELEPHONIC GOVERNING BOARD MEETING

In compliance with Executive Orders N-29-20 and N-35-20 issued by Governor Newsom on March 12 and March 21, 2020 respectively, the September 30, 2021 Special Board Meeting will be conducted via video/teleconference.

In compliance with the Executive Order, Board Members, interested parties, and members of the public will be able to call or sign into the meeting at 1:00 p.m. on Thursday, September 30, 2021.

HOW TO CONNECT TO THE MEETING

If you wish to connect to the meeting via Zoom video/teleconference, contact Coastline ROP Executive Assistant Debbie Ludwig at (714) 429-2212 or dludwig@coastlinerop.net. Please provide your name and email address to receive a link and instructions to access the meeting.

ELECTRONIC PUBLIC COMMUNICATION TO THE BOARD

Members of the public may submit comments on items on the agenda, and any item within the jurisdiction of the school district, via electronic submission no later than Thursday, September 30, 2021 by 12:00 p.m.:

By email at the following address: dludwig@coastlinerop.net

On-line: Google Forms (Links below)

English - [Coastline ROP Board of Trustees Comment Card](#)

Spanish - [Tarjeta de comentarios de la Junta Directiva de Coastline ROP](#)

Comments may not exceed three minutes.

For disability-related accommodations, including Zoom translation services, contact Coastline ROP Executive Assistant Debbie Ludwig at (714) 429-2212 or dludwig@coastlinerop.net, at least one working day before the scheduled meeting.

Coastline ROP Agenda Webpage: <https://www.coastlinerop.net/about-board.asp>

Meetings are recorded for use in the official minutes.

AGENDA

1. BOARD MEETING CALLED TO ORDER

Meeting is called to order by _____ at _____ a.m.

2. PLEDGE OF ALLEGIANCE

3. ROLL CALL:

Lauren Brooks, President	_____
Lynn Davis, Vice President	_____
Michelle Barto, Clerk	_____
Barbara Schulman, Member	_____
Diana Carey, Member	_____

4. ADOPTION OF AGENDA – Recommend the agenda be adopted as submitted.

Motion by _____ Seconded by _____

Votes:

- Member Brooks _____
- Member Schulman _____
- Member Davis _____
- Member Barto _____
- Member Carey _____

5. PUBLIC COMMENTS – Anyone desiring to address the Board on any item not on the agenda will be granted three minutes to make a presentation to the Board.

DISCUSSION/ACTION ITEMS

6. Leadership Associates Contract Approval **Discussion/Action**

Recommend the Board approve the service agreement contract with Leadership Associates to conduct a superintendent search.

Motion by _____ Seconded by _____

Votes:

- Member Brooks _____
- Member Schulman _____
- Member Davis _____
- Member Barto _____
- Member Carey _____

7. PUBLIC COMMENT ON CLOSED SESSION ITEMS – Anyone desiring to address the Board on any closed session item will be granted three minutes to make a presentation to the Board.

8. CLOSED SESSION **Discussion**

A. Public Employee Appointment: Superintendent (pursuant to Government Code §54957)

9. RECONVENE IN OPEN SESSION **Discussion**

A. Reporting out of closed session

9. ADJOURNMENT

Motion by _____ Seconded by _____

Votes:

- Member Brooks _____
- Member Schulman _____
- Member Davis _____
- Member Barto _____
- Member Carey _____

Next Scheduled Meeting: Thursday, October 14, 2021

Public Records related to the public session agenda that are distributed to the Governing Board less than 72 hours before a regular meeting may be inspected by the public at 1001 Presidio Square, Costa Mesa, during regular business hours (8:00 a.m. to 4:30 p.m.)



TO: Board of Trustees

FROM: Carol Hume

DATE: September 27, 2021

SUBJECT: Proposal and Contract for Leadership Associates

At the direction of the Board of Trustees, the proposal and contract for Leadership Associates to conduct a superintendent search for Coastline ROP are attached. Dennis Smith and Peggy Lynch will do a presentation and outline the process and timeline for you.





COASTLINE REGIONAL OCCUPATIONAL PROGRAM

September 20, 2021



 **TABLE OF CONTENTS**

Proposal Letter 1-3

Executive Summary 4

Search Process Plan 5-6

Search Process Flow Chart 7

Proposed Timeline 8

Cost Proposal 9

Sample Contract 10

References 11

Qualification Statement 12-16

- Experience and Qualifications of the Firm 12
- Qualifications of Lead Consultants 12-13
- Qualifications of Supporting Consultants 13-16

Leadership Associates Search List 17-20

Commendations 21-22

Search Firm and Consultant Contact Information



Lead Consultants

Dennis Smith, Ed.D.
 714.612.1708
dsmith@leadershipassociates.org

Peggy Lynch, Ed.D.
 760.519.8506
plynch@leadershipassociates.org

Leadership Associates

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

Penny Pyle
 Executive Assistant
 530.302.5112
ppyle@leadershipassociates.org



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

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

SENT VIA EMAIL

September 20, 2021

Lauren Brooks
Board President
Coastline Regional Occupational Program
1001 Presidio Square
Costa Mesa, CA 92626

Dear President Brooks and Coastline ROP Board Members:

Leadership Associates is pleased to submit a proposal to partner with you and the Coastline ROP Board to select a new superintendent.

Our firm has worked with a wide variety of school districts and education agencies throughout California since our founding in 1996. Since that time, Leadership Associates has completed more than 600 executive searches for California school boards. More than 85% of the superintendents selected have remained in their positions for more than five years. We are also able to meet the diverse needs of California's population. In 2020-21, for example, 67% of finalists selected were women or candidates of color. We are an executive search firm that focuses its work in California, which has helped us deepen our understanding of the ever-changing California educational landscape.

Our most recent experience incorporates conducting most, if not all, of the phases of a search in a virtual format, given the desires of the Board and the circumstances that exist at the time. We understand the challenges your organization may be facing during this time, and we are prepared to adapt our processes and protocols to meet or exceed your specific expectations throughout the entire search. Our work includes partnering with Boards in several similar and nearby districts, Regional Occupational Programs (ROP) and Special Education Local Plan Areas (SELPA) searches such as La Puente ROP, Baldy ROP, Mission Valley, Tri Cities ROP, Newport-Mesa USD, Tustin USD, Irvine USD, Saddleback USD and South Orange County SELPA.

Through the continued participation of several of our partners in education organizations such as the California Collaborative for Educational Excellence (CCEE) and the California County Superintendents Educational Services Association (CCSESA), we have remained current on key education policy and system wide developments including Local Control

and Accountability Plan (LCAP) and Local Control Funding Formula (LCFF) legislation. We have a strong record of success in helping districts and education agencies find superintendents who meet the profile developed by the Board with engagement of designated individuals led by Leadership Associates.

Through our years of experience, we have come to understand and respect the uniqueness of each board and education agency. While there are similarities, we believe that each education agency has a unique culture that is important to respect and understand. There are many good superintendent candidates but only some will be the right match for the ROP. It is our job and our commitment to you to find those candidates that best match your ideals and beliefs as an ROP.

In considering the uniqueness of the Coastline ROP, we are aware and respectful of the ROPs accomplishments and priorities:

- Course pathways aligned with postsecondary programs promoting sequential skill building.
- More than one-third of the Coastline ROP's courses meet the UC/CSU admission requirements.
- Internships at local business and industry sites where students improve their critical thinking skills, communication skills, and work attitudes.
- Courses taught by skilled teachers credentialed by the California Commission on Teacher Credentialing.
- A ratio of one CTE class for every two academic classes in order to minimize the risk of students dropping out of high school.
- Highly integrated rigorous academic and CTE programs resulting in higher achievement in reading, mathematics and science.
- More than 300 local businesses partner with Coastline ROP providing internship training, mentoring activities, and classroom presentations.

We would welcome the opportunity to partner with the Board to discuss the search process, an overview of the potential candidate pool, timeline, and the importance of maintaining a confidential process. We also want to obtain from the Board perspectives on District strengths and challenges as well as the desired qualities and characteristics of the new superintendent. Once this is done, we will prepare a summary report for the Board, develop a position description for Board review, and begin recruiting and vetting candidates who will be an excellent fit for you to choose from to serve as your next superintendent. We have had recent success conducting such meetings remotely via Zoom, Skype and our conference call line.

If our firm is selected, Peggy Lynch and I will be the lead consultants actively involved with this search. We are highly proficient in this field and are also former superintendents with many years of experience. In addition, to ensure the widest possible pool of qualified candidates, all partners who are located in various geographical regions of the state will actively support and assist with the search. Profiles of each partner are provided in the Qualification Statement of our proposal. We will use our extensive leadership network at the state and national level to help find the best candidates for this exciting, challenging, and rewarding position.

We look forward to having an opportunity to discuss this proposal with you and address any questions you may have. We realize how important it is for the Board to have a relationship with its search firm that is based on trust and respect. We will be fully committed to you and will provide the Board with high quality candidates who are a good match for the special community that is the Coastline Regional Occupational Program.

Respectfully,



Dennis Smith, Ed.D.
Lead Consultant
Leadership Associates



Peggy Lynch, Ed.D.
Co-Lead Consultant
Leadership Associates



EXECUTIVE SUMMARY

Leadership Associates is a California executive search firm with a national reach that specializes in helping California School Boards find new superintendents. We have done so since 1996 and have assisted with more superintendent searches than any search firm working in California. Our success is based on the following key factors:

1. We view each district as unique and therefore work as partners with the Board to develop a customized approach that the Board may use to select its new superintendent.
2. Through more than 6000 executive searches in California, the majority of these being superintendent searches, we have developed processes that lead to the successful hiring of candidates who meet the profile developed by the Board. These processes include engaging key stakeholders, conducting extensive recruiting and thorough reference checking, and working with the Board throughout the interview and contract approval processes.
3. Our partners are all former superintendents with successful leadership experiences in a variety of districts and in state and national organizations. We know the work. And we know who will do it well.
4. We understand and respect the factors that contribute to a highly effective governance team. We are committed to helping Board members work collaboratively with each other throughout the various stages of the selection process. Done well, a search will always strengthen the work of the Board and pave the way for a successful superintendent.
5. We bring the Board highly qualified candidates. In some respects our job is to make your ultimate decision a difficult one. We are proud of the high quality leaders we have been able to bring forward for Board consideration.
6. Our belief is that in order for superintendents to be successful they must have successful leadership experience leading and managing complex organizations. They should know what excellence in curriculum and instruction looks like and be deeply committed to equity. Their behavior must be of the highest integrity and reflect ethical values in their relationships with students, staff, community, and the Board. They must support powerful teaching and learning, build leadership capacity, and strengthen systems and processes that support high levels of achievement for all students.
7. We will always provide our best recommendations to the Board including those related to the hiring of specific candidates and the importance of maintaining a high degree of confidentiality so that the best possible candidates come forward.

In conclusion we believe the strengths of our firm are the right match for your district. The superintendent position is one of the most challenging leadership positions in this country. It demands a unique knowledge base and skill set. The new superintendent will need to inspire the confidence of teachers, parents, and community leaders, build on the good work done by so many, but never be afraid to challenge everyone to do better and encourage innovative thinking wherever possible. We are the firm that will help the Board find that leader.



SEARCH PROCESS PLAN

Leadership Associates has developed criteria to provide the Board of Education with a 9-phase process for selecting its next superintendent. The following is a brief description of each of the key steps of the search process, including identifying key personnel in each phase. The Board's designated administrative support staff will be guided and supported by our highly experienced executive assistant and provided with guidelines, templates, samples, checklists, and personal communication throughout the entire process.

****Indicates meetings with the Board***

Phase 1: **Initial Meeting with the Board* (Key Personnel: Consultants, Board, LA / district admin support; district I.T. support)

Leadership Associates will confer with the Board upon our selection to represent your district. At this meeting we will discuss all matters addressed in the Request For Proposal (RFP) Scope of Services, including the characteristics the Board is seeking in the next superintendent; District strengths and challenges for the future; the process for engaging groups and individuals in the District and community in the search process; approval of an official timeline and meeting dates; Board and Search Firm protocols during the search; possible contract parameters for the new superintendent; potential internal candidates; the Board's liaison with Leadership Associates and spokesperson for the Board; and all other matters addressed in the RFP Scope of Services which the Board may wish to discuss. We will meet with Board members individually, in person or by phone to learn each member's unique perspective. We will also be prepared to suggest criteria for consideration based on our own professional expertise. Immediately following the initial meeting we will work with district staff to create a Superintendent Search webpage on the district's website where members of the community can receive updates on the search process, including timelines, dates of community engagement opportunities, and access to online surveys.

Phase 2: Community and Staff Input (Key Personnel: Consultants, LA / district admin. support)

After working with the Board to develop a community engagement plan, we confer with the individuals and groups you request. We share the search process, timeline, answer questions, and solicit input regarding the desired qualities, characteristics, background, and experiences of the new superintendent, and we discuss the key characteristics of the District's culture, strengths, and future challenges and issues. We spend the time necessary to ensure full input. If individuals are unable to attend the meetings, but would like to provide additional information, or prefer to submit their ideas in a different format, opportunities are provided to contact us via email or telephone. We also have an online survey that can be utilized. We prepare a thorough report containing the comments from each group, individuals, and the survey, and send it to Board members approximately one week after the input. We follow up with you after you receive the report to review any questions you have.

Phase 3: Position Description (Key Personnel: Consultants, LA / district admin. support)

The Position Description will clearly state the criteria which applicants for the position should address in completing their application. It will also reflect input received on qualities and characteristics desired, a description of the District and community, and key search dates. The Board reviews the draft and makes changes before the description is finalized. The description is posted on our website, distributed widely, and can be posted on the District's website.

Phase 4: Advertising, Recruitment, Reference Checking (Key Personnel: Consultants)

After our sessions with the Board and designated staff/groups, we advertise and actively recruit both statewide and nationally. We will also conduct reference and database checks on all potential candidates. All partners participate in this process in order to take advantage of our extensive state and national network. These are very critical activities as we work diligently to find **6.7**

the candidates that best match those qualities and characteristics on the Position Description. We verify degrees, credentials and professional experiences. We do extensive confidential reference checking including conversations with people not listed on the candidate's application. We keep the Board informed on a regular basis about the progress of the search.

Phase 5: *Selection of Finalists (Key Personnel: Consultants, Board, LA / district admin. support)

At this Closed Session meeting, we will review and discuss all applicants, recommend candidates you should consider interviewing, and explain our rationale for recommending some and not others. We will provide an executive summary on each candidate that will include a tiered ranking of candidates for your review. The Board, however, makes the final decision on those to be interviewed and determines the interview schedule and location. We offer sample interview questions developed by consultants, and assist the Board in finalizing them with a focus on the specific needs of the District as gleaned from community and staff input and reflected in the position description. In addition to making interview arrangements with the candidates, we provide all the materials the Board needs for the interview, and make logistical arrangements in coordination with the superintendent's assistant or designated district liaison.

Phase 6: *Final Interviews (Key Personnel: Consultants, Board, LA / district admin. support)

The Board conducts the interviews in Closed Session with the consultants observing and handling all the logistics. We are present during the interviews and will help facilitate discussions assisting the Board as needed to help you in making your selection of the final candidate. We also assist with various follow up steps that need to be completed and inform all candidates of the outcome.

Phase 7: Validation Process; Contract (Key Personnel: Consultants, Board, LA / district admin. support)

The purpose of the validation process is to confirm the Board's choice prior to the official contract offer. The Board will determine participants for this process. While the consultants will not participate, we will work with the Board and the finalist as needed to develop final parameters for an agreement on the superintendent's contract. We recommend prior discussions with the Board on this topic since it is our intention to recruit candidates who will work within the contract parameters established by the Board.

Phase 8: Public Approval of Contract (Key Personnel: Consultants, Board, district admin. support)

Following the validation process, the Board takes public action at a regularly scheduled board meeting to employ the new superintendent. Leadership Associates will assist the Board and staff with a communication plan and other activities to support the approval of the new superintendent's contract.

Phase 9: After the New Superintendent is Signed (Key Personnel: Consultants, New Superintendent)

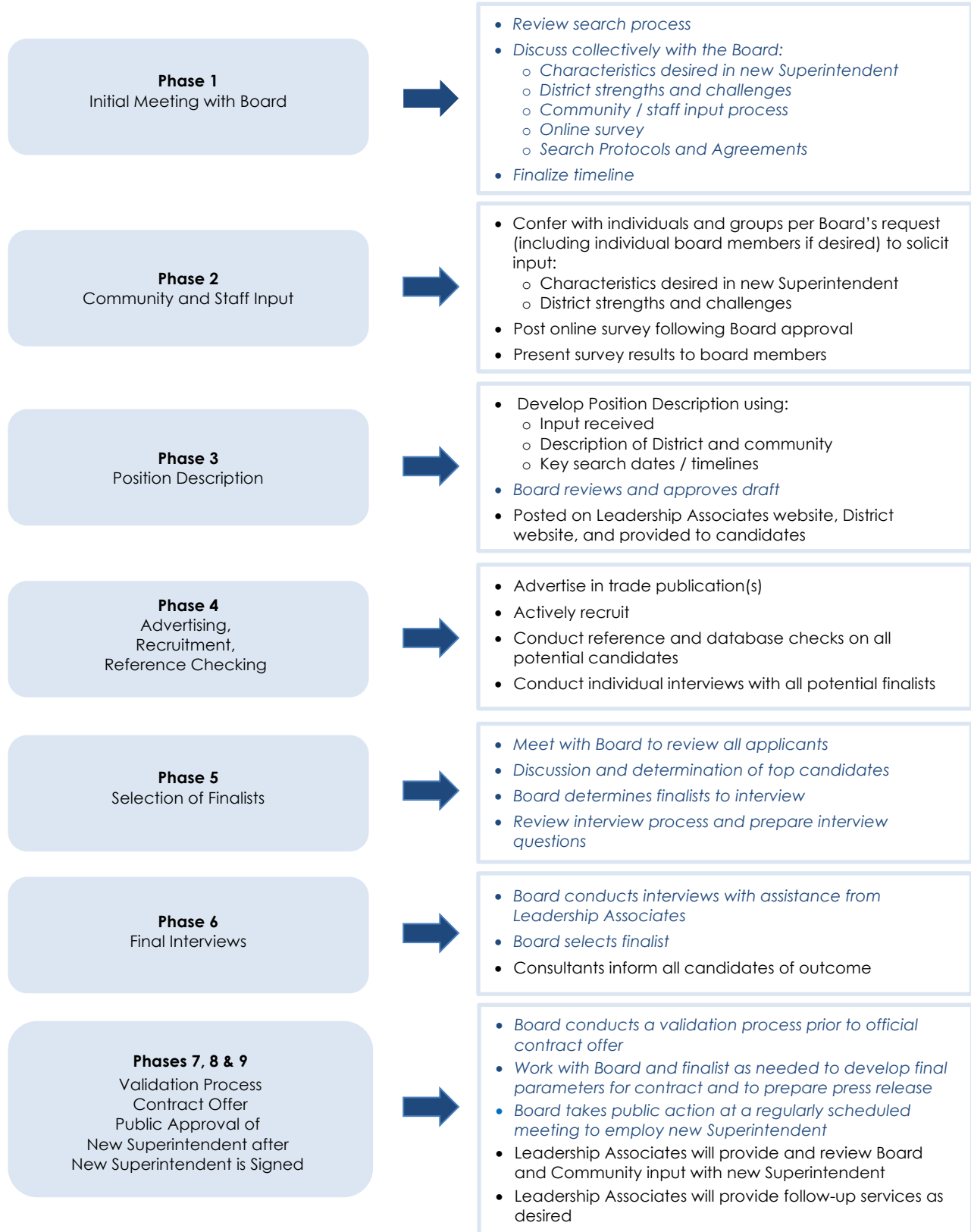
We provide and review with the new superintendent the Board and community input. We are available to provide additional follow up services as desired. These services could include developing a transition plan and an initial workshop for the governance team to establish goals for the new superintendent,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

Confidentiality: Leadership Associates strongly believes the quality of the applicant pool is directly dependent on the confidentiality of the process. Leadership Associates will not divulge the names of interested applicants to any party other than the Board within Closed Session. Reference checks will also be conducted using strategies that will maintain the confidentiality of the process. Throughout the process Leadership Associates will be available to answer any questions you may have.



SUPERINTENDENT SEARCH PROCESS FLOW CHART

Note: *Blue italicized text* indicates Board Participation





PROPOSED TIMELINE

(Flexible based on Board direction)

Coastline ROP Superintendent Search

Note: *Blue italicized text* indicates Board Participation

SEP 2021 Preliminary Phase	September 20	District receives proposals
	September 23	<i>Proposal Presentations / Board Selects Firm</i>
OCT - NOV 2021 Community Engagement; Advertisement and Recruitment	Early October	<i>Board confers with consultants and determines characteristics, skills & qualities desired in a new superintendent; Board publicly announces timeline and procedures for superintendent selection (Open and Closed Session)</i>
	Mid-October	Online survey dates (opens and closes)
	Mid-October	Consultants confer with staff and community designated by the Board to receive input
	October/November	Consultants identify potential candidates; Development and posting of recruitment materials and Position Description
	Oct 18 and Nov 1	Advertising and active recruitment; Ad appears in <u>EdCal</u> , (Two consecutive publications)
NOV 2021 Reference/ Background Checks and Selection	Friday, Nov 12, 5:00 PM	Deadline for applications
	November 12 - 23	Consultants complete comprehensive reference and background checks on applicants
	Week of November 29	<i>Board confers with consultants, reviews all applications and selects candidates to be interviewed (Closed Session; approx 3 hrs)</i>
DEC 2021 - JAN 2022 Interviews and Contract Approval	Week of December 6	<i>Board interviews candidates; selects finalist(s) (Closed Session; all-day meeting)</i>
	Week of December 13	<i>Board completes the validation process of the leading candidate and makes final determination</i>
	January	<i>Board approves superintendent contract at a regularly scheduled board meeting</i>
FEB 2022 Start Date	February 1, 2022 (or earlier for transition purposes as mutually agreed upon)	New superintendent begins



COST PROPOSAL

COASTLINE REGIONAL OCCUPATIONAL PROGRAM SUPERINTENDENT SEARCH 2021-2022

TOTAL FEE TO CONDUCT SEARCH: \$19,500 (all-inclusive)

This fee includes:

- All expenses incurred by consultants
- All meetings with the Board
- Development and posting of the position description announcing the position
- Cost of advertising in EdCal (Two consecutive publications)
- Acceptance of applications and responding to all inquiries regarding the position
- Recruitment of candidates and extensive background checks
- Gathering of staff/group input and providing Board with a written report, including online survey, if utilized.
- Coordination of logistics of the search:
 - scheduling appointments
 - notification of unsuccessful candidates
 - scheduling community visit
- Assisting in the development of interview questions and supporting the Board with the interview process
- Assisting the Board's administrative assistant throughout the process with templates, online posting updates and sample agenda language
- Acting as an advisor to the Board of Education
- Assisting the new superintendent and Board through transition and community verification visit, if conducted

GUARANTEE

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



SAMPLE CONTRACT

LEADERSHIP ASSOCIATES

www.leadershipassociates.org

3905 State Street #7-407
Santa Barbara, CA 93105
(530) 302-5112

AGREEMENT FOR CONSULTANT SERVICES

THIS AGREEMENT is made this **23rd day of September 2021** between LEADERSHIP ASSOCIATES, hereinafter called the Contractor, and **Coastline Regional Occupational Program**, hereinafter called the ROP.

The Contractor agrees to perform services for the ROP as follows:

The Contractor will conduct a Superintendent search, as delineated in the attached proposal.

The ROP agrees to pay the Contractor **NINETEEN THOUSAND, FIVE HUNDRED DOLLARS (\$19,500)** for services provided. Payment is to take place in two increments: **(1) \$9,750** upon completion of stakeholder input, and **(2), \$9,750** upon selection of a finalist. The Contractor will submit invoices to the ROP for each of the payment increments. Payments are due within 30 days of receipt of invoice.

**Remittance payable/forwarded to: Leadership Associates
Attn: Betty Hall
449 W. Foothill Blvd., #427
Glendora, CA 91741**

The Contractor is to perform the above services beginning September 23, 2021.

Contractor agrees to hold harmless and indemnify the ROP, its officers, agents, and employees with respect to all damages, costs, expenses or claims, in law or in equity, arising or asserted because of injuries to or death of person or damage to, destruction, loss, or theft of property arising out of faulty performance of the services to be performed by Contractor hereunder.

It is expressly understood and agreed to by both parties hereto that the Contractor, while engaged in carrying out and complying with any of the terms and conditions of this contract, is an independent contractor and is not an officer, agent, or employee of the aforesaid ROP. Either party may terminate this agreement by providing the other party with ten (10) days written notice. Upon such termination, fees will be determined on a pro rata basis.

Leadership Associates does not participate in a California public pension system. Leadership Associates and the ROP understand that the work/services provided should not be considered creditable toward the STRS earnings limit as the work is not normally performed by employees of the ROP and requires less than 24 months (496 business days). REF. CA Education Code § 26135.7 (2014)

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

ROP:
COASTLINE REGIONAL OCCUPATIONAL PROGRAM

By: _____

By: _____

Name: Dennis Smith, Ed.D.


Name: _____

Title: Lead Consultant

Title: _____

Date: _____

Date: _____

 **REFERENCES**

**COASTLINE REGIONAL OCCUPATIONAL PROGRAM
Superintendent Search**

DISTRICT	CONTACT NAME	TITLE	PHONE	EMAIL
1 Saddleback USD	Suzie Schwartz	Board President	949.510.5924	Suzie.swartz@svusd.org
2 Fullerton Joint USD	Marilyn Buschi	Board President	714.87.2802 Supt's Office	mbuchi@fjuhsd.org
3 Fountain Valley	Sandra Crandal	Board President	714.709.3879	crandalls@fvusd.us
4 Orange Unified	Kathy Moffat	Board President	714.655.2233	kmoffat@orangeusd.org



QUALIFICATION STATEMENT

EXPERIENCE AND QUALIFICATIONS OF THE FIRM

Leadership Associates has conducted over 600 executive searches in California since 1996. We have 14 partners and associates, all active educators and former, successful California superintendents who reside throughout the state – north, south, and central valley. While we are dedicated to California school districts, we have networks throughout the country and have assisted many school boards in finding top candidates from outside the state.

A few other facts about the partners of the firm:

- All keep superintendent searches as their core work
- All have national and state-wide networks and alliances including Council of the Great City Schools; Urban Education Dialogue (UED); Association of California School Administrators (ACSA); California Association of Latino Superintendents and Administrators (CALSA); California Association of African-American School Administrators (CAAASA); California Collaborative for District Reform; (CCDR); American Association of School Administrators (AASA); Suburban School Superintendents; and California City School Superintendents
- All belong to organizations which include top and emerging leaders
- Three were California State Superintendent of the Year
- Three chaired ACSA's California state superintendent's committee; two were ACSA presidents
- A number are bi-lingual in Spanish
- Many facilitate workshops in districts throughout the state: board/superintendent relations; board/superintendent protocols; strategic planning; superintendent evaluations; team building; and instructional improvement. Several coach and mentor superintendents and other top district leaders
- Most have taught or are currently teaching leadership courses at universities
- All have received awards for educational and community work, regionally, statewide, and nationally; and one was honored by the Mexican Consulate
- Partners have authored or co-authored the following publications; A Practical Guide to Effective School Board Meetings; Eight at the Top; Superintendent-School Board Practices; and The Superintendent's Planner
- District/Board Executive Assistant and administrative staff receive ongoing support and guidance from highly-qualified personnel with parallel district office experience

DIVERSITY POLICY

We value diversity in the workforce and embrace the cultural and demographic dimensions of our state and country. We work diligently to recruit candidates that represent the range of personal and professional backgrounds, and experiences and perspectives that arise from differences of culture and circumstances. This includes persons of varying age, ethnicity, gender, disability, race, sexual orientation, gender identity, religion, national origin, political affiliation, socioeconomic and family status, and geographic region.

QUALIFICATIONS OF LEAD CONSULTANT

Dennis M. Smith, Ed.D. – Partner, Search Lead

Dennis served as Superintendent of Schools for the Placentia Yorba Linda Unified School District (27,000 ADA) in Orange County until his retirement in June 2012. He also served as superintendent of the Orange County Public Schools in Orlando, Florida, the 16th largest school district in the United States. Prior to that, he served as superintendent of the Irvine Unified, Cajon Valley Union and Laguna Beach Unified

School Districts. Dennis served a total of 26 years as a Superintendent of Schools. Dennis has experience conducting executive searches since 2005, and has facilitated or assisted in the facilitation of more than 70 executive searches. Dennis was recognized as one of the top 100 Executive Educators in North America by the National School Boards Association, one of the 89 Rising Stars to Watch by the Los Angeles Times, one of the 100 Most Influential Business Leaders in Central Florida by the Orlando Business Journal, and the ACSA Region XVII Superintendent of the Year. He also served as President of the Southern California Superintendents' Association. Dennis received his Bachelor of Arts and Master's Degree from Arizona State University and his Doctorate from the University of Arizona. In addition, he has been an adjunct faculty member at California State University, Fullerton. Dennis has spoken at the local, state and national level on Board- Superintendent relations, Strategic Planning and Goal Setting and Organizational Management. He has consulted with school districts across the United States assisting school boards with superintendent searches and conducting workshops, trainings and organizational efficiency audits.

Peggy Lynch, Ed.D. – Partner

Peggy served as Superintendent for San Dieguito Union High School District in San Diego County until her retirement in April 2008. She also served as Superintendent of the Brea Olinda Unified School District in North Orange County for seven years, part of her nearly 14 years serving as a superintendent. Peggy has experience conducting executive searches since 2009, and has facilitated or assisted in the facilitation of more than 60 executive searches. She received her doctorate from the University of La Verne, her Master's Degree from Fullerton and her Bachelor's Degree from Parsons College in Iowa. Peggy chaired the ACSA Orange County and San Diego County Superintendents, was chair of the ACSA Superintendents' Symposium and ACSA's State Annual Conference. Peggy has received recognition from various organizations, including Southern California Women in Educational Management, Stanford University School of Engineering and the PTA. She has also co-authored several books, including *Effective Superintendent-School Board Practices; The Superintendent's Planner, A Monthly Guide and Reflective Journal;* and *Eight at the Top: A View Inside Public Education.*

QUALIFICATIONS OF SUPPORTING CONSULTANTS

Eric D. Andrew, Ed.D. – Partner

Dr. Andrew began his education career in 1979 as a teacher in Claremont Unified School District, where he taught students in kindergarten through sixth grade, and later became a site principal for elementary, middle and high school levels. Dr. Andrew served as Director of Student Services in Redlands Unified School District, served as an Assistant Superintendent of Educational Services in Glendora Unified School District, and later became Superintendent of the Campbell Union School District, a position he held for seven and a half years. Dr. Andrew is currently the President of the Region 8 Retiree Charter, a Region 8 Executive Consultant, and is on board California Association of African American School Administrators (CAAASA) and Santa Clara County Alliance of Black Educators (SCCABE). He also serves as an active member of the California Association of Latino School Administrators (CALSA). As a well-respected equity-focused administrator and instructional leader, he has earned several distinctions, including being named a finalist for the National Association of School Superintendents (NASS) Superintendent of the Year (2017). Dr. Andrew has been recognized by the Association of California School Administrators (ACSA) as the Region 8 Superintendent of the Year (2014), the State and Region 15 Central Office Administrator of the Year (2009), and the Region 12 Pupil Services Administrator of the Year award (2005). He holds a master's in education from Cal-Poly, Pomona, an administrative credential from Cal State San Bernardino and a doctorate in education from the University of LaVerne.

Kent L. Bechler, Ph.D. – Partner, Leadership & Organizational Development

Kent served as superintendent of the Corona-Norco Unified School District, the 9th largest school district in California until his retirement in 2012. The district was named a 2012 finalist for the \$1 million Broad Prize for Urban Education. He also served as superintendent in Walnut Valley Unified and Duarte Unified School Districts. Kent received a Bachelor's Degree in social work from Azusa Pacific University, a Master's Degree in educational administration from California State University, Los Angeles and a Ph.D. in

education from Claremont Graduate University. Kent has extensive training experience in management, leadership, systems, policies and procedures, strategic planning, labor relations, and developing collaboration and teamwork within organizations. His academic work includes teaching adjunct classes at the university level and consulting with educational institutions, businesses and other organizations. During Kent's 32 year career in K-12 education, he served in professional organizations including Association of California School Administrators (ACSA), California Collaborative on District Reform, American Association of School Administrators (AASA), Southern California Superintendents, Urban Education Dialogue and Educational Research Development Institute (ERDI).

Tom Changnon – Associate

Tom served as Stanislaus County Superintendent of Schools from 2007-2019. In his 12 years in office, Tom championed Civics Education, Character Development, Parent Involvement and Career Technical Education (CTE) programs. He earned his BA degree from Stanford University, Master Degree(s) in School Administration (St. Mary's, USF), and Teaching Certifications from College of Notre Dame. Tom has over 40 years of education experience at the elementary, middle, and high school levels. He also served as Assistant Superintendent and Superintendent prior to his election as the County Superintendent. Tom is an active member of the Association of California School Administrators (ACSA) serving on many local, regional and state committees including ACSA's Small School District Committee. Tom has received a number of awards, including being selected twice for the Bill Ullom Award and twice a recipient as the regional Superintendent of the Year award. In 2018 he received the Chamber Lifetime Citizen Achievement Award.

Marc A. Ecker, Ph.D. – Partner, Chief Financial Officer

Marc retired in December, 2014 as Superintendent of the Fountain Valley School District for 18 ½ years in that position. He served as Chair of the Orange County Special Education Alliance and is a past president of the Orange County Superintendents' Organization. Marc is a past State President of the Association of California School Administrators (ACSA). He served with other leading superintendents in providing input and advice on the development of the Local Control Funding Formula to the Governor and his staff. He also served on the State Public Schools Accountability Act Advisory Committee and two terms on the Financial Crisis Management Assistance Team Advisory Board. Marc is the financial officer for the California League of Schools and served as president of the Association of Middle Level Education. He is a full-time faculty member at California State University, Fullerton in the position of Distinguished Professor in the College of Education. He directs the ACSA mentor program and is currently the chairperson of the Schools First Federal Credit Union Board of Directors. Marc received his Bachelor's Degree from UCLA, his Master's Degree from California State University, Fullerton and his Doctorate from Alliant University. He is currently the Chief Financial Officer for the firm.

Richard Fischer – Partner

Rich served as Superintendent of Schools for 19 years in the Mountain View Los Altos Union High School District, Lake Tahoe Unified School District and the Harmony Union School District. He currently serves as Director of the Executive Leadership Center and is also a member of the El Dorado County Board of Education. Rich has been Director for the ACSA Superintendents' Academy and presenter and trainer for California Association of School Business Officials, California Foundation for Improvement of Employer-Employee Relations (CFIER), California State Superintendents' Symposium, El Dorado County Instructional Leaders - Series on Effective Leadership Techniques, Leadership Mountain View, and California School Leadership Academy. He has been honored as ACSA Regions 1,2,3 Superintendent of the Year and Administrator of the year as well as being named Los Altos of the Year in 2006. Rich received his Bachelor of Arts Degree from California State University, Northridge and his Master's Degree from California State University, Sacramento.

Sally Frazier, Ed.D. – Partner, Member at Large

Sally was elected Madera County Superintendent of Schools for six consecutive 4-year terms. She received her Doctorate from University of Southern California, and her Master's and Bachelor's degrees from California State University, Stanislaus. Sally served the California County Superintendents' Educational Services Association as President, Legislative Chairperson and numerous terms on its Executive Board. She was CCSESA's representative to ACSA's Superintendents Committee and its liaison

to the Springboard Schools Board of Directors. Sally chaired CCSESA's Commission on the Organization of Policy Groups, Organizing for Action. Sally was appointed by former State Superintendent of Public Instruction, Delaine Eastin, to the Education Commission for Technology in Learning. Sally was also appointed by Governor Schwarzenegger to the Advisory Commission on Juvenile Justice and Delinquency.

Juan Garza – Partner

Juan has been a superintendent for 15 years in Kings Canyon Unified School District, a district that has 22 schools. He has worked 27 years in the district that serves Reedley, Orange Cove and the communities of Navelencia, Squaw Valley, Dunlap and Miramonte. He was inducted into the Reedley Chamber of Commerce Hall of Fame, has been awarded Administrator of the Year, and has been a featured keynote speaker in various workshops on topics such as *Building Effective Governance Teams*, and *Working With the Members of your Rural Communities*, sponsored by Lozano Smith. Mr. Garza is also an active member of the California Association of Latino Superintendents and Administrators, (CALSA), where he has presented as part of a panel featured in CALSA workshops.

Phil Quon – Partner

Phil served as Superintendent for 19 years in the Bay Area – 13 years at Union School District in San José and the last six years in Cupertino Union School District. He served as the President of the statewide ACSA Superintendents Council, the Chair of the ACSA Superintendents' Symposium, and the President of the California City School Superintendents. He also served on the American Association of School Administrators (AASA) Governing Board and on the CSBA Annual Education Conference Planning Committee and Education Legal Alliance Advisory Group. He has been the Director of the ACSA Superintendents Academy as well as a presenter in the ACSA "Leading the Leaders" Program for newly appointed superintendents in California. He has chaired numerous WASC accreditation teams in California and Hawaii. Phil was a member of the CTC Teaching Mathematics Advisory Panel and a contributor to the National Journal Online Education Blog. Phil received his Bachelor's Degree in Mathematics from UCLA and his Master's Degree in Education Administration from CSULA.

Rich Thome – Partner

Rich Thome has conducted over 101 executive searches and 154 Board Workshops since 2003. Rich joined Leadership Associates in 2006. Prior to joining Leadership Associates, he also served as Director, Professional Learning in the Mobile Technology Learning Center (MTLC), a research center in the School of Leadership and Education Sciences (SOLES), at the University of San Diego. Prior to that assignment, he served as Director Educational Leadership Development Center at the University. In addition, Rich was an Executive Coach for Pivot Learning Partners in Los Angeles and San Diego Counties. His prior work included serving as Superintendent of the South Bay Union and Cardiff School Districts, Assistant Superintendent of Human Resources and Technology, and Superintendent Search Consultant for the San Diego County Office of Education. He also worked for 23 years as Teacher, Principal, Coordinator, Director and Assistant superintendent in the Capistrano Unified School District. Rich recently served on the University of San Diego School of Leadership and Education Sciences Advisory Board and on the Classroom of the Future Foundation Board of Directors. He received his Bachelor's degree from CSU, Los Angeles, and his Master's from Pepperdine University. Rich is Latino, is fluently bilingual in Spanish and received his Bilingual, Cross Cultural Specialist credential in California. Rich was awarded the prestigious Ohtli Award in 2008 for his 40 years of services to the Latino Community. In 2007 he was awarded the Excellence in Leadership Award by the University of California, San Diego, and in 2006, the Willie Velasquez Community Service Award. He is also a recipient of the Honorary Service Award from the California Congress of Parents, Teachers and Students; and the Orange County Hispanic Educator of the Year Award.

Sandy Sanchez Thorstenson – Partner

Sandy Sanchez Thorstenson served as the Superintendent of the Whittier Union High School District for fifteen years having spent her entire 39-year career in Whittier Union. Prior to becoming Superintendent, Mrs. Thorstenson served as Assistant Superintendent, Educational Services, High School Principal, Assistant Principal and Teacher. The Whittier Union High School District, a minority-majority high school district with a student enrollment comprised of eighty-six percent Latino and sixty-nine percent socio-economically

disadvantaged students, has demonstrated remarkable gains in student achievement at every school, in multiple indicators and over time. Most importantly, Whittier Union has narrowed the achievement gap from 35% to 9% and has proven on behalf of their students that demographics do not determine destiny. The Association of California School Administrators selected Mrs. Thorstenson as California's 2016 recipient of the Marcus Foster Administrator Excellence Award and its 2012 California Superintendent of the Year for AASA. She was selected as ACSA's Region XV Superintendent of the Year for 2007. Sandra Thorstenson served as president of ACSA's State Superintendency Council, president of California City School Superintendents Association, and was a member of Southern California Superintendents' Association and Urban Education Dialogue. She also served on the board for Pivot Learning Partners and the board of directors for the Whittier Chamber of Commerce. Mrs. Thorstenson was appointed by Governor Brown as the superintendent representative of the five-member board of the California Collaborative for Educational Excellence and served as chair helping to launch the state agency focused on providing support and assistance to school districts throughout California. She is a member of the California Collaborative for District Reform and currently serves on the board of directors of the Soroptimist International of Whittier.

Fred Van Leuven, Ed.D. – Associate

Fred served as President of Accrediting Commission for Schools of the Western Association of Schools and Colleges, (ACS WASC) for the San Francisco Bay Area from 2013 through 2018. He has served as the School Assistance Intervention Team Lead for Roosevelt High School in Fresno Unified and DAIT Team Member in Palmdale Elementary School District. He has assisted school boards, school districts and schools throughout California, Hawaii and Guam in a variety of key areas. He served as Superintendent of Santa Ynez Valley Union High School District for 12 years beginning in 1996, after three years as Director of Secondary Education for the Conejo Valley Unified School District, and retired in 2008. He also served as teacher and administrator for 13 years in the Saddleback Valley Unified School District and four years as Poway High School Principal in San Diego County. Fred is a graduate of the University of Southern California and holds a Doctorate in Education.

David J. Verdugo, Ed.D. – Partner

David served as Superintendent for the Paramount Unified School District (17,000 ADA) in Los Angeles County for 9 years. He also served as Assistant Superintendent of the Placentia-Yorba Unified School District (25,000 ADA, Director of Secondary Education, Principal at both Elementary and High School levels, teacher, and coach. He has a total of 43 years in the field of education spanning Grades K-12. His duties have included school facility management, extensive involvement with budget development, implementation of technology programs, employer/employee relations, curriculum and instructional strategies, and organizational development. His experience includes serving students of diverse populations and socioeconomic levels in urban and suburban settings. He was named the Association of California Administrators (ACSA) Region XIV Superintendent of the Year; received the California State University, Long Beach Outstanding Superintendent Leadership Award in 2012; the ALAS, Association of Latino Administrators and Superintendents; National Outstanding Educator Award in 2013; and, in 2020, was inducted into the University of Southern California USC Rossier School of Education "Hall of Fame", making him only the 23rd recipient of this prestigious award. He earned his Bachelor's Degree from Whitworth College in Spokane, Washington and his Master's Degree from the University of La Verne. His Doctoral Degree in Educational Administration was earned at the University of Southern California. Dr. Verdugo is a past Governing Board member to AASA and has addressed and spoken on State and National topics from building a case for reform to the importance of Arts in schools. He was the Executive Director of the California Association of Latino Superintendents and Administrators (CALSA) until 2019, as well as the former Superintendents' Leadership Academy Director for the Association of Latino Administrators and Superintendents (ALAS) based in Washington, D.C.



EXECUTIVE SEARCHES 2013-CURRENT

STATEWIDE

- | | |
|--|--------------------|
| 1. Association of California School Administrators (ACSA) | Executive Director |
| 2. California Collaborative for Educational Excellence (CCEE) | Executive Director |
| 3. California County Superintendents Educational Services Association (CCSESA) | Executive Director |
| 4. WestEd/GATES | Executive Director |

POSITION: COUNTY OFFICE OF EDUCATION SUPERINTENDENT

- | | |
|------------------------------|----------------|
| 1. Los Angeles County – 2011 | 1,500,000+ ADA |
| 2. Santa Clara County – 2008 | 275,000+ ADA |
| 3. Ventura County – 2021 | 135,312 ADA |

POSITION: SCHOOL DISTRICT SUPERINTENDENT (2013-Current)

<u>District</u>	<u>County</u>	<u>ADA</u>
1. Fresno USD	Fresno	73,356
2. San Francisco USD	San Francisco	58,865
3. Santa Ana USD	Orange	57,410
4. Capistrano USD	Orange	53,833
5. Corona-Norco USD	Riverside	53,148
6. Sacramento City USD	Sacramento	47,616
7. Oakland USD	Alameda	46,486
8. Riverside USD	Riverside	42,560
9. Stockton USD	San Joaquin	40,984
10. Fontana USD	San Bernardino	40,374
11. San Jose USD	Santa Clara	32,938
12. Anaheim Union HSD	Orange	32,085
13. San Ramon Valley USD	Contra Costa	31,900
14. Mt. Diablo USD	Contra Costa	31,013
15. West Contra Costa USD	Contra Costa	30,596
16. Bakersfield City SD	Kern	30,262
17. Modesto City Schools	Stanislaus	30,718
18. Orange USD	Orange	28,522
19. Saddleback Valley USD	Orange	27,803
20. East Side UHSD	Santa Clara	26,537
21. Rialto USD	San Bernardino	26,468
22. Placentia-Yorba Linda USD	Orange	25,821
23. Palm Springs USD	Riverside	23,332
24. Lake Elsinore USD	Riverside	22,000
25. Hemet USD	Riverside	21,977
26. Pajaro Valley USD	Santa Cruz	20,438
27. Folsom-Cordova USD	Sacramento	19,865
28. Anaheim City SD	Orange	19,312
29. Alvard USD	Riverside	19,255
30. Coachella Valley USD	Riverside	18,861
31. Riverbank USD	Stanislaus	18,750
32. Newport-Mesa USD	Orange	18,559
33. Antioch USD	Contra Costa	18,352
34. Panama-Buena Vista Union SD	Kern	18,250
35. Ventura USD	Ventura	17,430
36. Santa Rosa City Schools	Sonoma	16,700
37. Oxnard SD	Ventura	16,533
38. Burbank USD	Los Angeles	16,207
39. Cajon Valley Union SD	San Diego	16,059
40. Paramount USD	Los Angeles	15,681
41. Santa Clara USD	Santa Clara	15,509
42. Walnut Valley USD	Los Angeles	14,658
43. Vallejo City USD	Solano	14,554
44. West Covina USD	Los Angeles	14,402
45. Fullerton SD	Orange	13,661
46. Vacaville USD	Solano	12,561
47. Inglewood USD	Los Angeles	12,570
48. Acton-Agua Dulce USD	Los Angeles	12,523

<u>District</u>	<u>County</u>	<u>ADA</u>
49. San Dieguito UHSD	San Diego	12,485
50. Palo Alto USD	Santa Clara	12,357
51. Natomas USD	Sacramento	12,300
52. Metropolitan Education	San Jose	12,000
53. Oak Grove SD	Santa Clara	11,800
54. Upland USD	San Bernardino	11,665
55. Victor ESD	San Bernardino	11,531
56. San Lorenzo USD	Alameda	11,530
57. Evergreen School District	Santa Clara	11,385
58. Alameda USD	Alameda	11,299
59. Franklin-McKinley SD	Santa Clara	11,269
60. Merced City USD	Merced	11,009
61. Lucia Mar USD	San Luis Obispo	10,710
62. Pittsburg USD	Contra Costa	10,560
63. Azusa USD	Los Angeles	10,518
64. Berkeley USD	Alameda	10,340
65. Sequoia UHSD	San Mateo	10,238
66. Dublin USD	Alameda	10,000
67. Roseville City ESD	Placer	9,943
68. Los Alamitos USD	Orange	9,833
69. Yucaipa---Calimesa Joint USD	San Bernardino	9,655
70. Ocean View SD	Orange	9,461
71. Westminster SD	Orange	9,264
72. Morgan Hill USD	Santa Clara	9,022
73. Santa Maria JUHSD	Santa Barbara	7,633
74. East Whittier City ESD	Los Angeles	8,829
75. Davis Jt. USD	Yolo	8,626
76. San Mateo Union HSD	San Mateo	8,163
77. Novato USD	Marin	8,078
78. South Bay UESD	San Diego	7,682
79. San Rafael City Schools	Marin	7,200
80. Santa Cruz City Schools	Santa Cruz	7,092
81. Newhall SD	Santa Clarita	6,831
82. Fountain Valley USD	Orange	6,337
83. Newark USD	Alameda	6,294
84. Selma USD	Fresno	6,258
85. Ukiah USD	Mendocino	6,214
86. Brea Olinda USD	Orange	5,973
87. Alta Loma SD	San Bernardino	5,900
88. Santa Paula USD	Ventura	5,454
89. Monrovia USD	Los Angeles	5,404
90. Orcutt Union ESD	Santa Barbara	5,087
91. Oakley Union SD	Contra Costa	4,871
92. Buena Park SD	Orange	4,684
93. Moreland SD	Santa Clara	4,670
94. Charter Oak USD	Los Angeles	4,581
95. Sonoma Valley USD	Sonoma	4,564
96. Oak Park USD	Ventura	4,527
97. San Lorenzo Valley USD	Santa Cruz	4,444
98. Belmont-Redwood Shores SD	San Mateo	4,308
99. Wiseburn USD	Los Angeles	4,301
100. Ravenswood City SD	San Mateo	4,296
101. Paradise USD	Butte	4,261
102. Duarte USD	Los Angeles	4,247
103. Martinez USD	Contra Costa	4,156
104. Lindsay USD	Tulare	4,150
105. Central UHSD	Imperial	4,104
106. Cypress SD	Orange	4,000
107. Brawley ESD	Imperial	3,980
108. Eureka City Schools	Humboldt	3,884
109. Lake Tahoe USD	El Dorado	3,872
110. Enterprise ESD	Shasta	3,846
111. Hanford Joint Union HSD	Kings	3,802

<u>District</u>	<u>County</u>	<u>ADA</u>
112. Amador County USD	Amador	3,829
113. Lemon Grove SD	San Diego	3,797
114. Mountain View-Los Altos UHSD	Santa Clara	3,753
115. Fillmore USD	Ventura	3,734
116. Goleta Union SD	Santa Barbara	3,718
117. Del Norte County USD	Del Norte	3,591
118. Cabrillo USD	San Mateo	3,357
119. Cambrian SD	Santa Clara	3,349
120. Pacifica SD	San Mateo	3,150
121. San Marino USD	Los Angeles	3,146
122. Mill Valley Elementary SD	Marin	3,086
123. Exeter Public Schools	Tulare	3,000
124. Standard ESD	Kern	2,979
125. South Whittier ESD	Los Angeles	2,918
126. San Bruno Park ESD	San Mateo	2,785
127. Oroville City ESD	Butte	2,696
128. Castaic Union SD	Los Angeles	2,568
129. Fowler USD	Fresno	2,562
130. Scotts Valley USD	Santa Cruz	2,482
131. Jefferson SD	San Joaquin	2,477
132. Carmel USD	Monterey	2,468
133. Bear Valley USD	San Bernardino	2,453
134. Galt JUHSD	Sacramento	2,287
135. Lammersville JUSD	San Joaquin	2,200
136. Woodlake USD	Tulare	2,192
137. Red Bluff Union ESD	Tehama	2,178
138. Plumas USD	Plumas	2,130
139. Fort Bragg USD	Mendocino	1,917
140. Willits USD	Mendocino	1,907
141. Mariposa County USD	Mariposa	1,816
142. Byron Union SD	Contra Costa	1,686
143. Reed Union SD	Marin	1,556
144. Larkspur-Corte Madera SD	Marin	1,523
145. Colusa USD	Colusa	1,450
146. Chawanakee USD	Madera	1,423
147. Williams USD	Colusa	1,375
148. Las Lomitas ESD	San Mateo	1,336
149. Sierra USD	Fresno	1,323
150. Wilsona SD	Los Angeles	1,315
151. St. Helena USD	Napa	1,295
152. Guadalupe Union SD	Santa Barbara	1,280
153. Fall River JUSD	Shasta	1,209
154. Kentfield SD	Marin	1,177
155. Chowchilla UHSD	Madera	1,103
156. Taft UHSD	Kern	1,045
157. University Preparatory School	Shasta	900
158. Bass Lake JUSD	Madera	891
159. Lassen UHSD	Lassen	825
160. Banta ESD	San Joaquin	770
161. Wheatland UHSD	Yuba	739
162. Rancho Santa Fe SD	San Diego	700
163. Emery USD	Alameda	687
164. San Pasqual Valley USD	Imperial	654
165. Summerville UHSD	Tuolumne	624
166. Shoreline USD	Marin	504
167. Fort Sage USD	Lassen	483
168. Calaveras COE	Calaveras	450
169. Eastern Sierra USD	Mono	417
170. Le Grand Union ESD	Merced	401
171. Kings River Union ESD	Tulare	476
172. Alview-Dairyland Union SD	Madera	367
173. Clay Joint ESD	Fresno	250
174. Ballard SD	Santa Barbara	143

POSITION: EXECUTIVE DIRECTOR/DIRECTOR

175. Amethod Public Schools (Charter)	Alameda/Contra Costa
176. Baldy View ROP	San Bernardino
177. Birmingham Community Charter HS	Los Angeles
178. Clayton Valley Charter High School	Contra Costa
179. East San Gabriel Valley SELPA	Los Angeles
180. Oxford Preparatory Academy	Orange
181. San Ramon Valley SELPA	Contra Costa
182. So Orange County SELPA	Orange
183. West End SELPA, San Bernardino COE	San Bernardino
184. West San Gabriel Valley SELPA	Los Angeles



COMMENDATIONS FROM BOARD MEMBERS

Mt. Pleasant ESD: At every step of the way we found the services of the staff at Leadership Associates to be responsive to the specific needs of our district and the rapidly changing circumstances surrounding the [COVID-19] crisis. I highly recommend the services of Leadership Associates and specifically Eric Andrew and David Verdugo.

CCSESA: It was a pleasure to have your outstanding team provide such an important service to this process! This is a critical position and your team did a superb job in helping to ensure the process was collaborative, transparent and resulted in a selection of a top notch person!"

Lucia Mar USD: Thank you to Leadership Associates, especially Phil Quon and Fred Van Leuven, for leading our district through a professional and successful superintendent search. Your pre-search activities, outreach, screening, organization of materials and leadership was outstanding. We found our new superintendent and are confident we found a perfect fit."

Fresno USD: Thank you to Leadership Associates for all your assistance in the process. As you know, only two of us were on the Board the last time a Superintendent was hired and at that time, there was no search process. It was invaluable to have the assistance of a team that has experience in the selection of a Superintendent.

Wiseburn SD: Thank you for your thoughtful leadership and guidance in the process. It was an absolute pleasure meeting you, getting to know you and working with you. I certainly look forward to future opportunities and interactions with you. I think we made two excellent choices in Leadership Associates and Dr. Blake Silvers.

Bass Lake JUESD: Thank you Sally. I cannot express enough how grateful I am that we chose you and Leadership Associates for this process. The confidence I felt, throughout this process, in your ability to guide us, was tremendous. The step-by-step process that you led us through was focused, intentional, and direct. It was a pleasure to be a part of something that was so well thought out, with excellence as your minimum standard. You are so good at what you do! I wish you continued success for all the districts that you work with in the future. They need you whether they know it or not!

Whittier City SD: Leadership Associates' process ensured the school and community that the Board valued their input and wanted them to fully participate in the process. Leadership Associates was very accessible to our needs and calls. We are extremely pleased with the support we received ...and would rehire them again without question.

Coachella Valley USD: I know it's easy to say "it's your job", but you and your group have always gone above and beyond for our district and we sincerely appreciate it.

East Whittier City SD: Thank you for appointing Sandy Sanchez Thorstenson and Marc Ecker to supervise and coordinate our superintendent search. They ran the interviews like clockwork with plenty of time for reflection of each candidate at the end of the interview. We were presented with six outstanding candidates. It was challenging to decide which of them was the best fit for our District. We are confident that our choice of superintendent is that best choice. We were delighted to work with Sandy and Marc and will gladly recommend them as the premier search team.

Carmel USD: The entire process was extremely smooth and conducted with utmost respect for all parties involved. We were on time, and communication was regular, open and transparent. The most difficult part of the process was at the end of the interview process. The board had to choose only one candidate from the experienced pool of multiple candidates presented by Leadership Associates. We consider the superintendent search led by Leadership Associates an absolute success. The individual we hired is the perfect match for our students, staff and community.

Panama-Buena Vista SD: Leadership Associates is well connected throughout the state. The process from beginning to end was well communicated and very organized. Leadership Associates is literally a "who's who" of educators in the state. A successful superintendent search and hiring was our goal and Leadership Associates delivered!

Ft. Bragg USD: Leadership Associates brought to the search an impressive wealth and breadth of experience and contacts from large and small, urban and rural, coastal and inland school districts. Leadership Associates listened to us and recognized that although we are a small, rural district, we have high, twenty-first century goals for our kids.

Palo Alto USD: We recognize the selection of a superintendent is the most important decision we make as a school board, Leadership Associates designed an effective process to get to know us and to meet our needs - including recruiting candidates who were not looking for a new position.

Summerville JUHSD: Thank you for all the work you and the firm have completed. We know we were demanding because we have a really involved community. But you just moved forward and got the job done Great work!! We will highly recommend your service to any District in our County.

University Preparatory School: Leadership Associates was constantly available to us. Leadership Associates brought much more than guidance and experience; (the consultant) brought genuine kindness, creative vision and integrity that underpin all great endeavors. I highly recommend Leadership Associates.

Encinitas Union: Leadership Associates has years of experience in working with districts throughout California and their expertise was clearly evident when they provided us with an outstanding field of candidates. Their networking resources are unparalleled.

Irvine USD: With an unprecedented number of superintendent vacancies across the state, we were impressed with Leadership Associates' ability to attract highly qualified candidates, due in no small part to their excellent reputation and exceptional attention to confidentiality.

Moreland School District: Out of many highly qualified candidates brought to us by Leadership Associates, [the finalist] is the perfect choice for us at this time.

Placentia-Yorba Linda USD: Your diligence, patience, professionalism, and the confidential manner in which you conducted the search were exemplary. Indeed, one would be hard pressed to find a team to match the level of expertise and recognition within the professional learning community which you so ably employed on our behalf.

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

Oceanside USD: Their work with our administrative staff, our teachers, classified staff, and our community groups was excellent. They received praise for this work throughout our community. Our principals and central office staff were treated with utmost respect, and they were very complimentary of the professionalism of this search firm.

Walnut Valley USD: Not only are they consummate professionals, but their process in conducting the search was impeccable – from soliciting input from the Board and community members to developing personal and professional profiles, to screening the applicants to recommending the final candidates, to helping the Board finalize the main hiring points for our new superintendent.

Standard SD: Leadership Associates had regular communications with the board and dependably delivered on each step in our timeline. Trust in the process was a result of Leadership Associates' extensive experience and in the actions and care.... while respecting the role of trustees as the decision makers of the district.

Fullerton SD: Our Board was especially appreciative of the professional manner in which Leadership Associates reached out in a meaningful way to the educational community and listened to the direction of the Board of Trustees. I highly recommend Leadership Associates to any board seeking to conduct a thorough and in-depth superintendent recruitment and selection process.

Eureka City Schools: Leadership Associates persevered and actively recruited candidates suitable for our unique location. Their combined knowledge and experience were invaluable. It had been 13 years since our district's last superintendent search, and they supported our board throughout the entire process.

Folsom-Cordova USD: Leadership Associates received applications from California as well as other states in the country. They performed in-depth reference checks that resulted in a list of outstanding candidates to interview. Without their services as recruiters, we would not have had the rich field of candidates from which we eventually selected our new superintendent.

Fowler USD: Leadership Associates was completely thorough from their initial proposal to the Board, through the actual hiring of a successful superintendent candidate. The communication to all members of the Board and the designated District contact was exemplary throughout the process. Parents/community members/staff felt very comfortable sharing with Leadership Associates representatives the various traits valued in our next Superintendent. The on-line survey they utilized was especially helpful for members of the community and parents, as it gave them an opportunity for their voice to be heard if they were unavailable to schedule a meeting in person.

Fremont USD: Thank you all so much for your support and diligent work finding a great pool of candidates and helping us to select the best of the best.

Evergreen SD: Leadership Associates did an excellent job in our recent Superintendent Search process. This was the first time that our district has ever engaged in an external search process, and I found it much more rewarding and less stressful because of the superb support of Eric and Fred.

Santa Maria JUHSD: Great candidates! Appreciate your thorough vetting; best work yet for this district. My first-choice search firm does it again!!

Kentfield: Each of us is grateful for your great work on the search for Kentfield. we could not be more pleased by the thoughtful and extremely thorough search process. We particularly appreciated your flexibility, responsiveness, and creativity with the search over the past several weeks. Quite simply, you never skipped a beat with the search process, despite a global pandemic looming in the background. If there is ever a potential client on the fence about hiring you guys have them call me. They would be lucky to have you guys in their corner.



SERVICES AGREEMENT

LEADERSHIP ASSOCIATES

www.leadershipassociates.org

3905 State Street #7-407
Santa Barbara, CA 93105
(530) 302-5112

AGREEMENT FOR CONSULTANT SERVICES

THIS AGREEMENT is made this **30th day of September 2021** between LEADERSHIP ASSOCIATES, hereinafter called the Contractor, and **Coastline Regional Occupational Program**, hereinafter called the ROP.

The Contractor agrees to perform services for the ROP as follows:

The Contractor will conduct a Superintendent search, as delineated in the attached proposal.

The ROP agrees to pay the Contractor **NINETEEN THOUSAND, FIVE HUNDRED DOLLARS (\$19,500)** for services provided. Payment is to take place in two increments: **(1) \$9,750** upon completion of stakeholder input, and **(2), \$9,750** upon selection of a finalist. The Contractor will submit invoices to the ROP for each of the payment increments. Payments are due within 30 days of receipt of invoice.

Remittance payable/forwarded to: Leadership Associates
Attn: Betty Hall
449 W. Foothill Blvd., #427
Glendora, CA 91741

The Contractor is to perform the above services beginning September 30, 2021.

Contractor agrees to hold harmless and indemnify the ROP, its officers, agents, and employees with respect to all damages, costs, expenses or claims, in law or in equity, arising or asserted because of injuries to or death of person or damage to, destruction, loss, or theft of property arising out of faulty performance of the services to be performed by Contractor hereunder.

It is expressly understood and agreed to by both parties hereto that the Contractor, while engaged in carrying out and complying with any of the terms and conditions of this contract, is an independent contractor and is not an officer, agent, or employee of the aforesaid ROP. Either party may terminate this agreement by providing the other party with ten (10) days written notice. Upon such termination, fees will be determined on a pro rata basis.

Leadership Associates does not participate in a California public pension system. Leadership Associates and the ROP understand that the work/services provided should not be considered creditable toward the STRS earnings limit as the work is not normally performed by employees of the ROP and requires less than 24 months (496 business days). REF. CA Education Code § 26135.7 (2014)

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

ROP:
COASTLINE REGIONAL OCCUPATIONAL PROGRAM

By: *Dennis Smith*

By: _____

Name: Dennis Smith, Ed.D.

Name: Carol Hume

Title: Lead Consultant

Title: Superintendent

Date: September 30, 2021

Date: September 30, 2021

COASTLINE ROP SCHOOL DISTRICT

Initial Meeting, Discussion Items

September 30, 2021

1:00 p.m.

I. OPEN SESSION

1. Discussion and Review of Search Process
2. Designate Board's liaison and spokesperson for the Board
3. Confirm executive assistant has received guidelines and templates from Leadership Associates office admin staff
4. Board of Trustees email addresses (if posted on website, confirm)
5. Discuss the use of input from board, stakeholder groups in development of position profile.
 - Board affirms stakeholder groups for input sessions
 - Position description: District provides narrative of "community" and "district" (if not already available on website)
 - Board Members to review and respond to position description prior to posting on District's and Leadership Associates' website
 - Online survey dates, if desired
6. Establish and adopt the final timeline
 - ACSA and CAROROP publication: specify dates:
 - Affirm following date(s) for stakeholder input sessions
 - Closed session date for application review [2 hours]
 - Closed session date for interviews (all day)
 - Consideration of location for interview
 - Validation process, Board discussion and at Board discretion
 - Target date for offer of employment and approval of superintendent contract (must be on a regularly scheduled board meeting):
7. Candidate Recruitment
8. Worksheet of Contract Parameters [to be completed by candidates invited to interview]
9. Copy of current Superintendent Contract (Send to consultants)
10. Board questions/points for clarification
11. Board Members' Input:
 - Desired Qualities/Characteristics/Experiential Background
 - District's Strengths and Challenges

- Questions Regarding Process/Procedures

II. CLOSED SESSION



PROPOSED TIMELINE

(Flexible based on Board direction)

Coastline ROP Superintendent Search

Note: *Blue italicized text* indicates Board Participation

SEP 2021 Preliminary Phase	September 20	District receives proposals
	September 23	<i>Proposal Presentations / Board Selects Firm</i>
OCT - NOV 2021 Community Engagement; Advertisement and Recruitment	September 30 1:00 pm	<i>Board confers with consultants and determines characteristics, skills & qualities desired in a new superintendent; Board publicly announces timeline and procedures for superintendent selection (Open and Closed Session)</i>
	Mid-October	Online survey dates (opens and closes)
	Mid-October	Consultants confer with staff and community designated by the Board to receive input
	October/November	Consultants identify potential candidates; Development and posting of recruitment materials and Position Description
	Oct 18 and Nov 1	Advertising and active recruitment; Ad appears in <u>EdCal</u> , (Two consecutive publications), EdJoin and CAROCP
NOV 2021 Reference/ Background Checks and Selection	Friday, Nov 12, 5:00 PM	Deadline for applications
	November 12 - 23	Consultants complete comprehensive reference and background checks on applicants
	Week of November 29	<i>Board confers with consultants, reviews all applications and selects candidates to be interviewed (Closed Session; approx 2 hrs)</i>
DEC 2021 - JAN 2022 Interviews and Contract Approval	Week of December 6	<i>Board interviews candidates; selects finalist(s) (Closed Session; all-day meeting)</i>
	Week of December 13	<i>Board completes the validation process of the leading candidate and makes final determination</i>
	January	<i>Board approves superintendent contract at a regularly scheduled board meeting</i>
FEB 2022 Start Date	February 1, 2022 (or earlier for transition purposes as mutually agreed upon)	New superintendent begins

COASTLINE ROP DISTRICT
Superintendent Search
Stakeholder Input Individual/Groups

SAMPLE

Stakeholder Input Sessions

1. Coastline ROP Board
2. Coastline ROP Superintendent
4. Cabinet/ Key Staff Members
5. Teacher Leader(s)
6. District Office Staff
7. Steering Committee
8. District Superintendents (Tustin USD, Irvine USD, Saddleback Valley USD, Newport-Mesa USD, Huntington Beach UHSD)