

*A Proposal Prepared for*

# ***Pacific Grove Unified School District***

***Pacific Grove, California***

*for*

*The Search and Selection of a  
Superintendent of Schools*

*submitted in collaboration with*



*by*

**MCPHERSON *MJ* JACOBSON, LLC**  
EXECUTIVE RECRUITMENT & DEVELOPMENT



Phone: 888-375-4814  
Email: [mail@macnjake.com](mailto:mail@macnjake.com)  
Website: [www.macnjake.com](http://www.macnjake.com)



## Cover Letter



**MCPHERSON & JACOBSON, L.L.C.**  
Executive Recruitment & Development  
*in collaboration with the California School Boards Association*



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888-375-4814 ♦ Email: [mail@macnjake.com](mailto:mail@macnjake.com) ♦ Website: [www.macnjake.com](http://www.macnjake.com)

April 12, 2023

Board of Trustees  
Pacific Grove Unified School District  
435 Hillcrest Ave.  
Pacific Grove, California 93950

Thank you for the opportunity to respond to your RFP. The enclosed proposal describes the professional services the California School Board Association representative, McPherson & Jacobson, L.L.C. will provide Pacific Grove Unified School District in ensuring your superintendent search secures quality leadership for the district.

McPherson & Jacobson will work with the board to design a search that meets the unique needs of your school 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 diverse stakeholder groups you identify, will implement a systematic, comprehensive process culminating in the hiring of the most qualified candidate for your district.

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

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

Our contact information:

McPherson & Jacobson, L.L.C.  
11725 Arbor Street, Suite 220  
Omaha, Nebraska 68144  
Telephone: 402-991-7031/888-375-4814  
Fax: 402-991-7168  
Email: [mail@macnjake.com](mailto:mail@macnjake.com)

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

If our proposal is accepted, McPherson & Jacobson agrees to enter into a contract under the terms and conditions shown in the Instruction to Proposers and the Specifications.

Sincerely,

*Dr. Norman Ridder by pky*

McPherson & Jacobson L.L.C.

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04/23

## *About McPherson & Jacobson*

### *Our Contact Information:*

McPherson & Jacobson, L.L.C.  
11725 Arbor Street, Suite 220  
Omaha, Nebraska 68144  
Telephone: 402-991-7031/888-375-4814  
Fax: 402-991-7168  
Email: [mail@macnjake.com](mailto:mail@macnjake.com)

### *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.

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

#### **California School Board Association Search Service**

The **California School Board Association** has selected McPherson & Jacobson, L.L.C. to represent them in conducting superintendent searches in California. McPherson & Jacobson is a leading national search firm that has California-based consultants. Our California consultants understand California and its unique requirements and laws.

## Leading National Search Firm

McPherson & Jacobson, L.L.C. has been conducting national searches for governing boards since 1991. The firm has placed **over 940 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 130 consultants** across the nation. Over one-fourth of McPherson & Jacobson consultants are minorities or female. Our diverse group of consultants has extensive backgrounds in education and public service including current and former superintendents, assistant superintendents, university professors, and school board members. Over fifty percent have a doctorate degree. Their diversity and expertise ensures your search results in quality leadership for education excellence.

## Sustainability in Leadership

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

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

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

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

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

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

1. Consultants share the moral imperative and collective ownership to identify and eliminate disparities to ensure all candidates have an equal opportunity regardless of their race, ethnicity, socioeconomic status, cognitive/physical ability, language, marital status, gender, sexual orientation, gender identity, disability, or religion;
2. Eliminate barriers in recruitment, hiring, retention, and internal processes;



3. Utilize culturally relevant practices that do not discriminate based upon language, marital status, gender, sexual orientation, gender identity, cognitive/physical ability, or religion;
4. Promote catalytic leadership for educational and community partners;
5. Support the continuing development of all personnel with a focus on their mindset, beliefs, knowledge, and skills, including an understanding of implicit bias and racial identity;
6. Incorporate the voices, cultures, and perspectives of diverse students, families, and communities into decision making to create a sense of belonging for all;
7. Support and comply with State and District policies.

## *Applicant Diversity*

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

McPherson & Jacobson has **over 130 consultants** across the nation. 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.

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.

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

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

## *Selected References*

### *Superintendent Searches*

#### **South Monterey County Joint Union High School District**

800 Broadway St.

King City CA 93930

School Phone: 831-385-0606

School District Contact: David Gaboni 831-809-2268

Search Year: 2022/23

Enrollment: 2,200

**Linden Unified School District**

18527 E. Main St.  
Linden CA 95236  
School Phone: 209-887-3894  
School District Contact: Virginia Lavagnino/ Grace Luke  
Board Contact: Eric Nims 209-481-2203  
Search Year: 2020/21  
Enrollment: 2,300

**Gonzales Unified School District**

600 Elko St.  
Gonzales CA 93926  
School Phone: 831-675-0100  
School District Contact: Monica Silva 831-809-1066 ext. 8110  
Board Contact: Celeste Daniel 831-744-6456  
Search Year: 2021/22  
Enrollment: 2,000

**Old Adobe Union School District**

845 Crinella Drive  
Petaluma CA 94954  
School Phone: 707-765-4321  
School District Contact: Dawn Walker  
Board Contact: Heather Burton 707-291-6930 707-291-6930  
Search Year: 2019/20  
Enrollment: 1,950

**Riverbank Unified School District**

6715 Seventh Street  
Riverbank CA 95367  
School Phone: 209-869-2538  
School District Contact: Susana Andalon  
Board Contact: Ernest Velasco  
Search Year: 2022/23  
Enrollment: 2,400

## *Consultants for Search*

### Bios

#### **Dr. Daniel Moirao—Lead Consultant**



Dr. Daniel Moirao joined McPherson & Jacobson in 2019. Dr. Moirao has served as superintendent of schools in vastly diverse multicultural communities, urban, suburban, and rural. He has also been appointed as a State Administrator for a school district under state receivership. These districts are now recognized for their academic prowess and fiscal stability.

Dr. Moirao has been effective in working with schools, school districts and their leaders to develop highly successful equitable learning organizations that have exceeded their goals. He is a certified executive coach, and trainer of leaders, a strategic planner and facilitator. Dr. Moirao is a dynamic leader, trainer, teacher, and keynote speaker for administrators, teachers, and parents.

Dr. Moirao has participated in superintendent searches for: Gonzales Unified School District, Evergreen Elementary School District, Pacifica School District, Stockton Unified School District, and Newark Unified School District.

#### **Dr. Michele Huntoon**



Dr. Michele Huntoon joined McPherson & Jacobson in 2022.

Dr. Huntoon has participated in the CUE, Inc. Executive Director/CEO search; and the superintendent search for South Monterey County Joint Union High School District

## Resumes

**Dr. Michele Huntoon**  
**Hollister, California 95023**  
**Email: m\_huntoon@macnjake.com**  
**Phone: 916-300-7997**

**Educational Background**

Ed. D.	2021	Concordia University	Educational Leadership
B.S.	1991	Sacramento State University	Business/Accounting
A.A.	1988	American River College	Liberal Arts

**Professional Experience**

<b>Dates</b>		<b>Title</b>	<b>District</b>	<b>Location</b>	<b>Enrollment</b>
2021	to Present	Consultant	McPherson & Jacobson, L.L.C.		
2016	to Present	Superintendent	Aromas-San Juan Unified School District		
2016	to 2016	Interim Superintendent	Aromas-San Juan Unified School District		
2015	to 2016	Education Consultant			
2015	to 2015	Associate Superintendent of Business	Alameda County of Education		
2013	to 2015	Chief Business Official	Stockton Unified School District		
2009	to 2013	Instructor	CBO CASBO/FCMAT Mentor Program	Sacramento, CA	
2005	to 2013	Adjunct Faculty	University of Southern California USC	Sacramento and Orange County, CA	
2004	to 2016	Presenter	ACSA CBO Business Manager's Academy	Northern CA	
2003	to 2004	Adjunct Faculty	California State University	Sacramento, CA	

2000	to	2013	Associate Vice President	School Services of California, Inc.
1998	to	2002	Independent Certified Public Accountant	Michele A. Huntoon, CPA, Sole Proprietor
1995	to	1998	Finance Director	Placer County Office of Education
1991	to	1995	Audit Manager	Richard Goodell & Company, CPAs

### Professional Organization Memberships

Name of Organization	Dates			Offices Held
Rotary Club	2021	to	Present	Foundation Chairperson
South County CalSOAP	2019	to	Present	Chair
San Benito County SELPA	2019	to	2020	Chair
Superintendents' Executive Leadership Forum (SELF), UC Davis School of Education	2019	to	2020	Member
Region 10 Association of California School Administrators (ACSA)	2019	to	Present	Treasurer
California School Business Officials	1997	to	2000	Chair

## *Search Process*

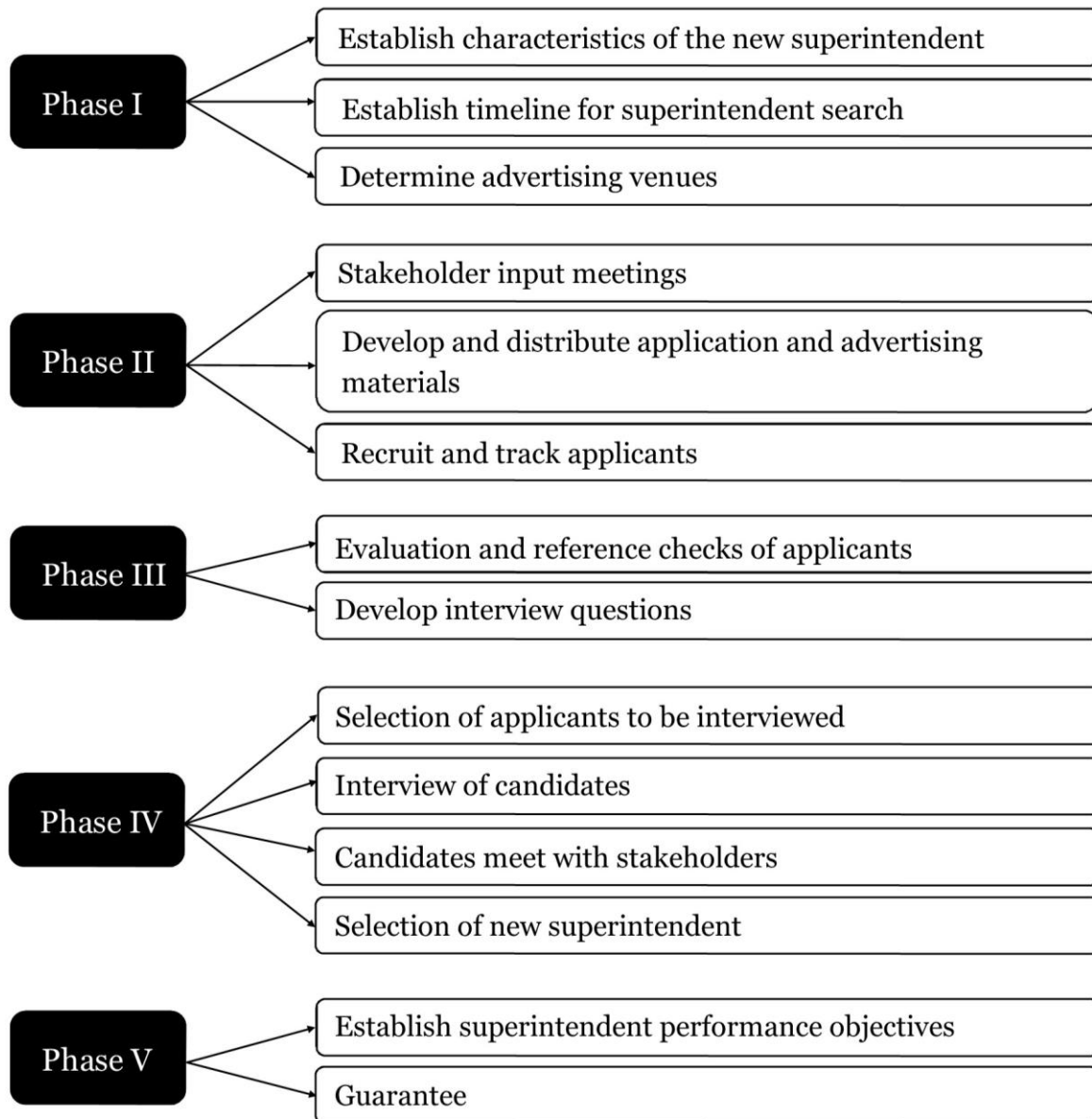
### *Executive Summary*

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—Initiating the Search Process*

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



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

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

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

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

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

✓ **Identify appropriate stakeholder groups.**

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

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

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

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

✓ **Identify the point of contact for the district**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

✓ **Confidentiality of Applicants**

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

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

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

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

✓ **Communicate with all Board Members in a timely manner**

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

*Phase III—Applicant Screening*

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

The consultants will read and evaluate all of the completed files submitted by applicants. They will read the application form and all of the additional 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 qualifications. We go a minimum

of three people removed from the primary references. What we are looking for is consistency of answers that will verify the applicant's strengths and weaknesses.

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

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

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

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

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

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

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

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

The consultants will 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.

✓ **Conduct background checks.**

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

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

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

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

✓ **Coordinate interview and visitation procedures.**

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

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

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

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

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

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

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

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

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

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

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

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

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

Once a contract has been offered by the board and accepted, the consultants will call each of the other final candidates and thank them on behalf of the board for interviewing for the position. *These candidates are not notified until an offer has been accepted.* If by chance you lose your top candidate, we want to keep viable candidates available.

*Phase V—Transition with Success*

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

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

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

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

✓ **Provide a guarantee.**

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

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

## *Timeline*

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

**Possible Timeline:** *(can be adjusted to meet the needs of the board and district)*

- At the beginning of the search (**early May 2023**)
  - The qualities for the new superintendent are identified
  - A formal timeline is established
  - Advertising decisions are made
  - Application information is posted
  - A brochure is created to advertise the district and the vacancy
  
- At the time designated by the board (**mid to late May 2023**)
  - 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 (**early June 2023**)
  - All the completed applicant files are forwarded to the consultants
  - The consultants begin the review and pre-interview process
  
- Approximately two to four weeks after the closing date (**mid-June 2023**)
  - Consultants provide information to the board on all applicants who completed the process
  - Consultants present summary profiles and video interviews of qualified candidates to the board
  - The board selects the candidates it wants to interview
  - Criminal/financial/degree verification background checks are conducted on the candidates selected to be interviewed
  - McPherson & Jacobson notifies each applicant not selected for an interview
  
- Soon after the board selects their candidates (**mid to late June 2023**)
  - Semi-finalist interviews are conducted (if chosen by the board)
  - The board interviews its final candidates
  - The board selects their new superintendent
  - McPherson & Jacobson's consultants contact each candidate who was interviewed to notify them of their status

*Responsibilities of Pacific Grove Unified School District  
and McPherson & Jacobson, L.L.C.*

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



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

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

## *Stakeholder Involvement*

Obtaining stakeholder input is an integral part of McPherson & Jacobson's search process. Since 1991, McPherson & Jacobson has conducted over 940 superintendent searches for school districts ranging from 10 to over 300,000 students. For each search, we have coordinated stakeholder input sessions. Besides meeting with stakeholder groups designated by the board, an online input survey is also available for those who cannot attend the meetings. After the meetings have been completed, the board will receive a written report with the findings of the meetings and online input.

### **Initial stakeholder input sessions**

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

### **Meeting the candidates**

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

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

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

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

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

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

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

McPherson & Jacobson will also allow stakeholders to submit their input online.

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

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

### **Process for Obtaining Online Stakeholder Input**

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

# Cost Proposal

## Required Form

### REQUEST FOR PROPOSAL PRICE FORM

**Pacific Grove Unified School District**

RE: Request for Proposal – Superintendent Search

Dear Members of the Board of Trustees:

The undersigned, doing business under the firm name of McPherson + Jacobson, L.L.C., having carefully examined the Notice to Proposers, the Instructions, and the Specifications for the proposed Superintendent Search Services proposes to perform the contract, including all of its component parts, and to furnish all services, and taxes called for by them for the entire order, as follows:

Amount of proposal \$ 18,500

*\* per parameters on the following pages*

SUBMITTED BY:

McPherson + Jacobson, L.L.C.  
COMPANY

11725 Arbor St., Suite 220  
ADDRESS

Omaha NE 68144  
CITY/STATE/ZIP

Norman Ridder p.g.  
SIGNATURE

Norman Ridder  
PLEASE TYPE OR PRINT NAME

Owner  
TITLE

Apr 12, 2023  
DATE

402-991-7031  
PHONE

## *Investment*

**The fee for conducting the superintendent search is \$13,000 for Phases I-V.**

*McPherson & Jacobson has the tools to conduct all or some components of the search process electronically. We can work with the board to determine the best practices as the search progresses to determine if in-person or online meetings will best meet the needs of the district.*

**The total not to exceed amount including expenses is \$18,500.\***

Included in the expenses is

- Two (2) weeks of print advertising in EdCal (40-word ad)
- Sixty (60) days of advertising on EdJoin
- One (1) day of in-person stakeholder meetings
- Online stakeholder input surveys
- Video interviews of candidates (five (5) video interviews are included in the not to exceed amount)
- Criminal/financial/credential verification background check for candidates chosen by the board for interviews (four (4) background checks are included in the not to exceed amount)
- Travel expenses for consultants to travel to the district for the scheduled meetings
- Office expenses

*\*\*If the district chooses to do parts of the search using online meetings, the expenses may decrease.*

### **NOTE:**

- Expenses may increase if the district chooses additional media advertising.
- Fees and expenses will increase if the district requests additional stakeholder input days.
- Interview expenses for the candidates are not included in the expenses listed.

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.

### **Personality/Strengths Assessments Option**

If the board requests, personality strength tests can be completed for the candidates. Birkman International Signature Reports can be obtained for the candidates the district chooses to interview. The estimated fee for this service is \$700 per candidate.

## *McPherson & Jacobson Guarantees*

### *Client Satisfaction*

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

If the board chooses to use our complete service, we will guarantee our process for **two (2) years**. If the person selected leaves the position, for whatever reason, within the guarantee period, we will repeat the process at no charge except actual expenses. *The guarantee is valid only if the board is comprised of fifty (50) percent or more of the member who hired the superintendent.*

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

### *Price Match*

McPherson & Jacobson, L.L.C. will match the search fee for comparable services.

### *Recruiting the Selected Candidate*

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

## *Additional 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.

# Non-Collusion Declaration Form

## NON-COLLUSION DECLARATION

State of ~~California~~ Nebraska )  
 )  
County of Douglas ) ss.

I, Norman Ridder, being duly sworn, declare that I am Owner of McPherson + Jacobson, LLC, the party making the foregoing proposal that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the Proposer has not directly or indirectly induced or colluded, conspired, connived, or agreed with any other Proposer or anyone else to put in a sham proposal, or that anyone shall refrain from proposing; that the Proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Proposer or any other Proposer, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other Proposer, or to secure any advantage against the public body awarding the contract or anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the Proposer has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated this 12 day of April, 2023 at Omaha, NE ~~California~~.

Norman Ridder  
Signature



## Addenda Form

### ADDENDA

The undersigned acknowledges receipt of the following addenda and the cost, if any, of such revisions has been included in the Lump Sum Grand Total of your proposal.

Addenda No. \_\_\_\_\_ Dated \_\_\_\_\_

Addenda No. \_\_\_\_\_ Dated \_\_\_\_\_

Addenda No. \_\_\_\_\_ Dated \_\_\_\_\_

Addenda No. \_\_\_\_\_ Dated \_\_\_\_\_

Name of Proposer McPherson + Jacobson, L.L.C.

## *Additional Information*

### *California Consultants*

**Mrs. Nicole Anderson**, Educational Consultant, Vallejo  
**Mr. James Bates**, Retired Superintendent, Bakersfield  
**Dr. Michele Bowers**, Retired Superintendent, Lancaster  
**Ms. Aida Buelna**, Retired Superintendent, Woodland  
**Dr. Adam Clark**, Superintendent, Mt. Diablo USD, Concord  
**Dr. Penelope DeLeon**, Former Superintendent, Fontana  
**Dr. Sonny Da Marto**, Retired Superintendent, Folsom  
**Dr. Reyes Gauna**, Retired Superintendent, Lodi  
**Dr. Shelley Jones-Holt**, Educational Consultant, Sacramento  
**Dr. Michele Huntoon**, Superintendent, Aromas-San Juan School District  
**Mr. William Huyett**, Retired Superintendent, Lodi  
**Mr. Benjamin “Ben” Johnson II**, Former Board Member, Riverside  
**Dr. Steven Lowder**, Retired Superintendent, Stockton  
**Dr. Michael McCoy**, Retired Superintendent, Bakersfield  
**Mr. Jesse Modesto**, Retired Administrator, Woodland  
**Dr. Daniel Moirao**, Retired Superintendent, Danville  
**Mr. Daniel Moore**, Superintendent, Linden  
**Dr. Stanley Munro**, Administrator, Fresno USD, Clovis  
**Mr. Dennis Murray**, Retired Superintendent, Folsom  
**Dr. Marilyn Shepherd**, Retired Superintendent, Friant  
**Mr. Edward Velasquez**, Retired Superintendent, Chino  
**Mr. Daniel Zeisler**, Retired Superintendent, Chicago Park ESD, Grass Valley

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

**Albany Unified School District, Berkeley**  
Search Year: 2018/19, Enrollment: 3,714

**Alisal Union School District, Salinas**  
Search Year: 2019/20, Enrollment: 9,000

**Alpine Union School District, Alpine**  
Search Year: 2015/16, Enrollment: 1,700

**Anderson Union High School District, Anderson**  
Search Year: 2018/19, Enrollment: 1,800

**Association of California School Administrators (ACSA)—Sr. Director of Diversity,  
Equity and Inclusion, Sacramento**  
Search Year: 2022/23

**Benicia Unified School District, Benicia**  
Search Year: 2014/15, Enrollment: 5,000

**Calexico Unified School District, Calexico**  
Search Year: 2017/18, Enrollment: 8,966

**Central Unified School District, Fresno**  
Search Year: 2021/22, Enrollment: 15,000

**Central Union High School District, El Centro**  
Search Year: 2021/22, Enrollment: 4,116

**Cold Spring School District, Santa Barbara**  
Search Year: 2016/17, Enrollment: 175

**Conejo Valley Unified School District, Thousand Oaks**  
Search Year: 2014/15, Enrollment: 19,500

**Davis Joint Unified School District, Davis**  
Search Year: 2021/22, Enrollment: 8,300

**Denair Unified School District, Denair**  
Search Year: 2017/18, Enrollment: 1,500

**Del Norte Unified School District—Executive Director of Special Education,  
Crescent City**  
Search Year: 2022/23, Enrollment: 3,600

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**Mount Shasta Union School District, Mt. Shasta**  
Search Year: 2021/22, Enrollment: 534

**Natomas Unified School District, Sacramento**  
Search Year: 2022/23, Enrollment: 16,000

**Nevada Joint Union High School District, Grass Valley**  
Search Year: 2017/18, Enrollment: 2,600

**New Haven Unified School District, Union City**  
Search Year: 2018/19, Enrollment: 12,148

**Newark Unified School District, Newark**  
Search Year: 2019/20, Enrollment: 5,700

**Newcastle Elementary School District, Newcastle**  
Search Year: 2022/23, Enrollment: 398

**Newcastle Elementary School District, Newcastle**  
Search Year: 2014/15, Enrollment: 796

**Old Adobe Union School District, Petaluma**  
Search Year: 2019/20, Enrollment: 2,097

**Oakley Union Elementary School District, Oakely**  
Search Year: 2020/21, Enrollment: 4,900

**Oxnard Union High School District, Oxnard**  
Search Year: 2019/20, Enrollment: 16,800

**Pacifica School District, Pacifica**  
Search Year: 2022/23, Enrollment: 3,000

**Parlier Unified School District, Parlier**  
Search Year: 2019/20, Enrollment: 3,500

**Paso Robles Joint Unified School District, Paso Robles**  
Search Year: 2013/14, Enrollment: 6,500

**Penn Valley Union Elementary School District, Penn Valley**  
Search Year: 2014/15, Enrollment: 700

**Piner-Olivet Union School District, Santa Rosa**  
Search Year: 2019/20, Enrollment: 1,300

**Pollock Pines Elementary School District, Pollock Pines**  
Search Year: 2015/16, Enrollment: 800

**Rancho Santa Fe School District, Rancho Santa Fe**  
Search Year: 2022/23, Enrollment: 581

**Red Bluff Joint Union High School District, Red Bluff**  
Search Year: 2013/14, Enrollment: 1,622

**Richland School District, Shafter**  
Search Year: 2015/16, Enrollment: 3,504

**Riverbank Unified School District, Riverbank**  
Search Year: 2022/23, Enrollment: 2,400

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

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

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

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

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

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

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

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

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

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

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

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

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

**Siskiyou Union High School District**, Mt. Shasta  
Search Year: 2021/22, Enrollment: 555

**Soledad Unified School District**, Soledad  
Search Year: 2020/21, Enrollment: 5,000

**Soledad Unified School District**, Soledad  
Search Year: 2016/17, Enrollment: 4,800

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

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

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

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

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

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

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

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

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

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

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

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

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

## *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 article discusses McPherson & Jacobson’s stakeholder involvement.

### **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**

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



Matt Best  
Superintendent

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

To whom it may concern:

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

Sincerely,

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



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

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

**Professional Development  
Service Center**  
1791 W. Acacia Avenue  
Hemet, CA 92545  
(951) 765-5100  
Fax: (951) 765-5115

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

**Governing Board**  
Stacey Bailey  
Rob Davis  
Megan Haley  
Gene Hikel  
Vic Scavarda  
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Ross Valenzuela

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August 13, 2020

To Whom It May Concern:

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

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

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

Sincerely,

Christi Barrett, Ph.D.  
Superintendent

## Comments from Santa Barbara Unified School District

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

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

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

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

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

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

Monday, September 19, 2022

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

Re: Letter of Reference for McPherson and Jacobsen, LLC

To Whom It May Concern,

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

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

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

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

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



Gregg Gunkel, Board President Siskiyou Union High School District

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

Bill:

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

Neil Layton  
San Carlos School District  
San Carlos, CA