



449 W. Foothill Blvd., #427
Glendora, CA 91741
(916) 520-4951
www.leadershipassociates.org

ERIC ANDREW ♦ KENT BECHLER ♦ WILLIAM BANNING ♦ JAMES BROWN ♦ BLANCA CAVAZOS ♦ TOM CHANGNON ♦ MARC ECKER ♦ DONALD EVANS ♦ RICHARD FISCHER ♦ SALLY FRAZIER ♦ JUAN GARCIA ♦ JACQUELINE HOBBS ♦ PEGGY LYNCH ♦ MIKE MILLER ♦ DENNIS SMITH ♦ RICH THOME ♦ SANDY THORNTON ♦ DAVID VERDUGO

SENT VIA EMAIL

February 15, 2024

Kimberly Hines, Board President
Cabrillo Unified School District
498 Kelly Avenue
Half Moon Bay, CA 94019

Dear President Hines and Cabrillo Unified School District Board of Trustees:

Leadership Associates is pleased to submit a proposal to partner with you to select a new superintendent. As Lead Search partners for Leadership Associates, we will personally work with you on the search for your new superintendent.

Our firm has worked with a wide variety of school districts throughout California since our founding in 1996. Since that time, Leadership Associates has completed more than 650 executive searches, with the majority being superintendent searches, for California school boards. More than 85% of the superintendents selected have remained in their positions for more than five years.

Our intentionality to support the diverse student population in California is reflected in our recruitment efforts. We work diligently to ensure the candidate pool includes candidates that have a proven track record of experience in culturally proficient practices that have proven successful in addressing educational equity gaps. In fact, this past year, 63% of the individuals selected by school boards where Leadership Associates led the search were women or persons of color. This approach is made possible through the extensive network of our diverse partners who have expertise leading school systems through an equity lens. We believe this deep commitment has been the key factor contributing to our unparalleled successful placement of high-quality superintendent candidates across the state. We will dedicate ourselves to ensuring you have the finest and most diverse pool of candidates from which to select to serve as your new superintendent.

Our work includes partnering with Boards in several similar and/or nearby districts such as San Mateo Union High School District, San Bruno Park School District, Mill Valley School District, as well as Cabrillo Unified School District. We know the Bay Area well and have an extensive reach throughout your region and the state that will allow us to recruit the strongest pool of candidates for your consideration. We have a strong record of success in helping districts find superintendents who meet the profile developed by the Board with extensive engagement from staff, parent leaders and community led by Leadership Associates.

Through our years of experience, we have come to understand and respect the uniqueness of each board and district. While there are similarities among districts, we believe that each district 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 your school district. It is our job and our commitment to you to find those candidates that best match your ideals and beliefs as a district.

We would welcome the opportunity to partner with the Board to discuss the search process, including options for staff and community input, an overview of the potential candidate pool, timeline, and the importance of maintaining a confidential process. We also want to obtain from the Board and subsequently from staff, parents and community groups' 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.

If our firm is selected, Jacki Horejs and I will be the lead consultants actively involved with this search. We are very experienced 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 the search 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 Cabrillo Unified School District.

Respectfully,



Peggy Lynch, Ed.D.
Lead Consultant
Leadership Associates

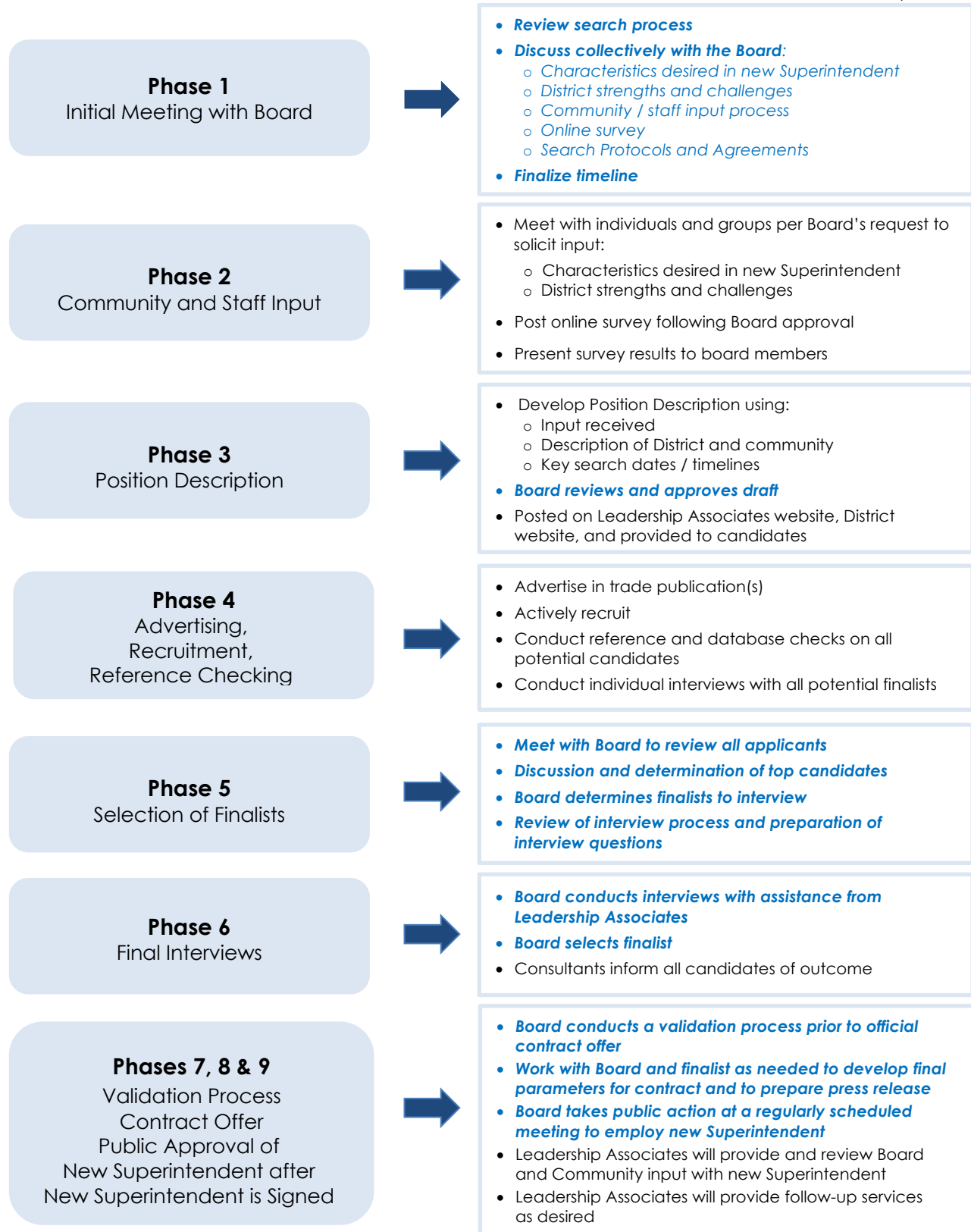


Jacki Horejs, Ed.D.
Lead Consultant
Leadership Associates



SUPERINTENDENT SEARCH PROCESS FLOW CHART

Note: *Blue italicized text* indicates Board Participation





PROPOSED TIMELINE

(Flexible based on Board direction)

Cabrillo Unified School District Superintendent Search

Note: *Blue italicized text* indicates Board Participation

FEBRUARY 2024	February 15	<i>Board approves agreement to conduct search</i>
FEBRUARY/MARCH 2024 Community Engagement	Week of February 26 (Special Mtg)	<i>Initial Meeting with the Board; Board determines characteristics, skills & qualities desired in new superintendent; publicly announces timeline and procedures (Open and Closed Session; approx 3 hrs total)</i>
	March 4-13, 2024	Online survey dates
	Early March	Consultants confer with staff and community designated by the Board to receive input
MARCH 2024 Advertisement and Recruitment	March	Consultants identify potential candidates; Development and posting of recruitment materials and Position Description
	Month 11 and 18	Advertising and active recruitment; Ad appears in <u>EdCa!</u> , (Two consecutive publications)
	March 29, 5:00 PM	Deadline for applications
APRIL 2024 Interviews and Selection	Early April	Consultants complete comprehensive reference and background checks on applicants
	Week of April 15 (Special Mtg)	<i>Board confers with consultants, reviews all applications and selects candidates to be interviewed (Closed Session; approx 3 hours)</i>
	April 27, 2024 (Special Mtg)	<i>Board interviews candidates; selects finalist(s) (Closed Session; all-day meeting)</i>
MAY/JUNE 2024 Contract Approval	Early May	<i>Board completes the validation process of the leading candidate and makes final determination</i>
	June	<i>Board approves superintendent contract at a regularly scheduled board meeting</i>
JULY 2024 Start Date	July 1, 2024 (as mutually agreed)	New superintendent begins



PARTNER QUALIFICATIONS

QUALIFICATIONS OF LEAD CONSULTANTS

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*.

Jacqueline Horejs, Ed.D. – Partner

Dr. Horejs is a seasoned educational professional with a firm belief that leadership matters for student, school, and district success. Her professional experiences over 40 years in education have provided her with a multi-faceted skill set and understanding of the needs of educational leadership. Dr. Horejs successfully served nine years as the Superintendent of Union School District, in San Jose, CA. Prior to serving as Superintendent, she worked as the Director of Instructional Services at the County Office and the Regional Director for the Statewide System of School Support, and later as the Assistant Superintendent for Educational Services in Gilroy Unified School District. In those roles she has led initiatives for organizational alignment, strategic planning, community engagement, multi-tiered systems for student support, and school improvement. She has served as the Interim Director of the Preliminary Administrative Credential Program at the Santa Clara County Office of Education and is currently a coach and instructor in the Tier 2 Clear Administrative Credential Program. She holds a Bachelor of Arts Degree from the University of Illinois, a Masters in Educational Administration from San Jose State, and a Doctorate in Educational Leadership from USC. Since retiring in 2015, she has been conducting Executive Searches, facilitating Governance Workshops and Superintendent Evaluations, and coaching Superintendents and other administrators.



FEE AND SUMMARY OF SERVICES

CABRILLO UNIFIED SCHOOL DISTRICT SUPERINTENDENT SEARCH

TOTAL FEE TO CONDUCT SEARCH: \$24,500 (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 community and staff input and providing Board with a written report, including online survey
- 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 superintendent leave within one year, Leadership Associates will conduct a search targeted at identifying specific qualified candidates at no cost except for advertising costs and direct expenses provided the Board majority has remained the same and the Board has established first year annual goals for the superintendent.



SERVICES AGREEMENT

LEADERSHIP ASSOCIATES

www.leadershipassociates.org

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Glendora, CA 91741

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AGREEMENT FOR CONSULTANT SERVICES

THIS AGREEMENT is made this **15th day of February 2024** between **LEADERSHIP ASSOCIATES**, hereinafter called the Contractor, and **CABRILLO UNIFIED SCHOOL DISTRICT**, hereinafter called the District.

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

The Contractor will conduct a Superintendent search, as delineated in the summary of services.

The District agrees to pay the Contractor **TWENTY-FOUR THOUSAND FIVE HUNDRED DOLLARS (\$24,500)** for services provided. Payment is to take place in two increments: **(1) \$12,250** upon completion of educational partner input, and **(2), \$12,250** upon selection of a finalist. The Contractor will submit invoices to the District 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 February 15, 2024.

Contractor agrees to hold harmless and indemnify the District, 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 District. 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 District 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 District and requires less than 24 months (496 business days). REF. CA Education Code § 26135.7 (2014)

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

DISTRICT:
CABRILLO UNIFIED SCHOOL DISTRICT

By: _____

By: _____

Name: Betty Hall

Name: _____

Dept: Fiscal Services

Title: _____

Date: _____

Date: _____