

# Superintendent Search Proposal

## January 25, 2023



**Prepared by:**

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**Education Support Services Group**  
a subdivision of aalrr

January 25, 2023

Krista Castellanos, Board President  
Capistrano Unified School District  
33122 Valle Road  
San Juan Capistrano, CA 92675

Dear President Castellanos and Members of the CUSD Board of Trustees:

Thank you for your consideration of Education Support Services (ESS) Group to assist the Capistrano Unified School District Governing Board in its search for your next superintendent. It would be a privilege to work with the Board, staff, and community in this important endeavor.

The ESS Consulting Group has been affiliated with Atkinson, Andelson, Loya, Ruud & Romo since 2006. Our focus is to provide non-legal solutions for TK-14 school systems around human resource needs, labor relations, leadership development, fiscal management, board governance, and executive coaching. Our consultants include former superintendents who remain active in an array of undertakings within the field of education, including superintendent searches.

In the following pages, you will find a description of services, proposed timelines, and the fee that underscore the four phases of an ESS search. What makes our firm unique is that any aspect of the activities described herein can be modified to align with Board priorities and preferences. ESS's ability to be nimble leads to an exceptional client experience that is streamlined, hands-on, and cost effective.

If ESS is invited to conduct the search for Capistrano's next superintendent, our well-connected advisers Dr. Joseph Farley and Dr. Suzette Lovely will facilitate the process. Collectively, these talented educators have served in every position from instructional aide to classroom teacher to principal to director to assistant/deputy superintendent to superintendent in small, medium and large districts across the region. Moreover, Dr. Lovely and Dr. Farley are uniquely familiar with Capistrano's rich history, commitment to excellence, and strong community engagement -- having both served in top leadership roles in your District.

Over the past several years, Dr. Lovely, Dr. Farley, and other members of the ESS team have facilitated dozens of high-profile searches in districts of varying size and composition, including many in Orange County. A list of our searches along with the retention rates of placed candidates can be found on page four of this proposal. Also within the proposal are adviser biographies, client contact information, and letters of endorsement that speak to ESS's track record of success.

Our advisers look forward to meeting with the Board to provide more detail about ESS's proposal and answer your questions about the search process.

Sincerely,

*Alan Rasmussen*

Alan Rasmussen, Ed.D, Managing Consultant  
arasmussen@aalrr.com  
714-907-3634

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## **A Boutique Search Experience**

*We believe the customer experience happens by design.*

### **THE ESS DIFFERENCE**

- We are known for our personalized attention and service.
- We maintain a limited number of search clients at any given time to ensure greater accessibility and responsiveness to trustees and respective applicants.
- We collaborate directly with the Governing Board to solidify a search timeline that aligns with local circumstances and needs (e.g., Board meeting schedules, trustee availability, District calendar, community expectations, etc.).
- We have a track record of assembling applicant pools with diverse backgrounds and experiences that represent the face of California.
- We are highly networked and connected throughout California and Orange County.
- We actively recruit individuals who are a strong match for CUSD; however, we do not maintain a stable of candidates.
- We engage a third-party screening company, and a social media analyst, to conduct extensive criminal, civil, credit, education, and digital background information on the Board's finalist.
- We are nimble.

### **One Size Doesn't Fit All**

- Candidate qualifications, experience, and leadership attributes are linked to CUSD Board, staff, and community ideals.
- A detailed *Leadership Profile Report* is presented to the Board highlighting key findings regarding the state of the district and essential characteristics stakeholders desire in your next superintendent.
- Trustees receive weekly communiqués to keep apprised of the search progress.
- The vacancy is posted on EDJOIN, EDCAL (print and on-line publications) and any other platforms determined by the Board.
- Board members have access to all applications and supporting materials.
- The proposal outlined herein calls for a fee not to exceed \$28,500.

## Section 1: Experience Recruiting and Retaining Superintendents

*Below is a list of superintendent searches conducted by Dr. Farley, Dr. Lovely, and/or ESS advisers since 2016. Unless otherwise indicated, all superintendents remain in their position.*

<b>District</b>	<b>ADA</b>	<b>Superintendent</b>	<b>Hire Date</b>
LAUSD	565,000 (TK-12)	Michelle King	January 1, 2016 (medical leave 2017)
Carlsbad USD	11,000 (TK-12)	Ben Churchill	July 1, 2016
Coronado USD	3,377 (TK-12)	Karl Mueller	July 1, 2016
Laguna Beach USD	2,800 (TK-12)	Jason Vilorio	July 1, 2016
Huntington Beach Union High School District	15,534 (9-12)	Clint Harwick	January 1, 2017
Acton-Agua Dulce USD	12,532 (TK-12)	Larry King	September 18, 2017 (resigned March 2021)
Gustine USD	1,765 (TK-12)	Bryan Ballenger	March 1, 2018
Anaheim City Schools	15,600 (TK-8)	Chris Downing	July 1, 2018
Solana Beach School District	2,820 (TK-6)	Jodee Brentlinger	July 1, 2018
Oceanside USD	16,220 (TK-12)	Julie Vitale	July 1, 2018
Santa Ana USD	46,593 (TK-12)	Jerry Almendarez	November 21, 2019
Menifee Union School District	12,142 (TK-8)	Jennifer Root	October 19, 2020
Placentia-Yorba Linda Unified School District	24,296 (TK-12)	Jim Elsasser  Mike Matthews (Interim)	January 4, 2021 (resigned June 30, 2022)  July 1, 2022 (search/placement at no additional charge)
Huntington Beach City School District	5,588 (TK-8)	Leisa Winston	January 4, 2021
Pleasant Valley School District	6,802 (TK-8)	Danielle Cortes	June 14, 2021
San Marcos USD	19,894 (TK-12)	Andy Johnsen	July 1, 2021
Central School District	4,219 (TK-8)	Amy Nguyen-Hernandez	July 1, 2021
West San Gabriel SELPA	9,150 (TK-12)	Tamara Schiern	July 1, 2021
Manhattan Beach USD	6,030 (TK-12)	John Bowes	July 7, 2021
West Covina USD	14,000 (TK-12)	Emy Flores	January 3, 2022
Ocean View School District	7,329 (TK-8)	Michael Conroy	July 1, 2022
Desert Sands USD	26,300 (TK-12)	Kelly May-Vollmar	July 1, 2022
Calexico USD	8,563 (TK-12)	Arturo Jimenez	July 1, 2022
Alta Loma School District	5,561 (TK-8)	Sherry Smith	July 1, 2022
Lawndale Elementary School District	5,189 (TK-8)	Virginia Castro	August 1, 2022

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*Below you will find the names of trustees who served as Board President during their superintendent search and can speak to the personalized care and attention ESS advisers provide clients. See Appendix A for additional letters of endorsement.*

<b>Client Reference</b>	<b>Email</b>	<b>Phone</b>
Carrie Buck, Trustee Placentia-Yorba Linda Unified SD	cbuck@pylusd.org	
Stacy Carlson, Trustee San Marcos Unified SD	stacy.carlson@smusd.org	
Gina Clayton-Tarvin, Trustee Ocean View School District	ginaclaytontarvin@gmail.com	
Duane Dishno, Trustee Huntington Beach Union HSD	ddishno@hbuhd.edu	
Jennifer Fenton, Trustee Manhattan Beach Unified SD	JFenton@mbusd.org	
Jackie Filbeck, Trustee Anaheim Elem School District	jfilbeck@anaheimelementary.org	
Vicki King, Trustee Solana Beach School District	vking@sbsd.net	
Carol Normandin, Trustee Laguna Beach Unified SD	cnormandin@lbusd.org	
Dr. Rigo Rodriguez, Trustee Santa Ana Unified SD	rigo.rodriguez@sausd.us	

## Section 2: Proposed Search Plan, Timelines and Activities

An ESS search involves four phases represented by the acronym **EAST: Engagement, Activation, Selection, Transition**. The timelines and activities described herein can be modified to meet Board priorities, District needs, scheduling opportunities, and unforeseen circumstances.

<b>Engagement Phase: February 6 – March 17, 2023</b>	
<p>Board Workshop</p> <p>Discuss Search Protocols</p> <p>(Special Open/Closed Session Board Meeting)</p> <p>Week of February 6<sup>th</sup> or 13<sup>th</sup></p>	<p>This two-hour workshop assists the Governing Board to become 'search ready'. The workshop includes: review of search timelines and process; confidentiality commitments; compensation considerations/salary parameters; screening factors; and experience requirements. The Board identifies District needs, leadership priorities, stakeholder groups to provide input, and prospective candidates they would like ESS to contact.</p> <p>A general position description, qualifications, and job posting are created based on the Board's input/direction.</p>
<p>Stakeholder Input</p> <p>Completed by March 6, 2023</p>	<p>Search advisers meet with individuals and key groups to identify selection considerations, needs, and ideal qualities of CUSD's next Superintendent.</p>
<p>Presentation of Leadership Profile</p> <p>March 15, 2023</p> <p>(Open Session)</p>	<p>Advisers present a <i>Leadership Profile Report</i> to the Board summarizing stakeholder input. Board affirms the criteria highlighted in the profile and adds any additional screening factors that may be relevant. Candidates are recruited, screened, and selected based on District needs and ideal leadership qualities identified by the Board and community.</p>
<b>Activation Phase*: March 1 – April 5, 2023</b>	
<b>*Overlaps with Engagement Phase</b>	
<p>Job Posting</p> <p>Opens: March 6, 2023</p> <p>Closes: April 2, 2023</p>	<p>Superintendent vacancy posted in a variety of sources and on-line platforms, including EDJOIN, EdCal, and other Board-determined publications.</p>
<p>Recruitment</p> <p>Ongoing</p>	<p>ESS advisers utilize an array of local, state, and national networks to actively recruit, engage, and screen candidates who match the <i>Leadership Profile</i> characteristics.</p>
<p>Reference Checks</p> <p>Ongoing</p>	<p>ESS advisers contact candidate references and conduct "blind" appraisals of each applicant, including review of social media accounts and digital footprint. Candidates are evaluated and ranked against the <i>Leadership Profile</i> criteria.</p>



<b>Selection Phase: April 6, 2023 – May 17, 2023</b>	
Review of Applications April 14-21, 2023	Trustees review confidential application materials on their own prior to Closed Session, in which the candidate slate for interviews will be discussed and finalized.
Determination of Candidate Slate Week of April 24, 2023 (Special Closed Session Board Meeting)	Board meets with ESS advisers to identify the best qualified candidates to invite for interviews. Candidates not selected to interview are notified. Board finalizes first-round interview questions. Trustees affirm employment contract parameters.
First-Level Interviews Saturday, May 6, 2023 (Special Closed Session Board Meeting)	First-level interviews conducted by the Governing Board. At the conclusion of the daylong interviews, the search advisers guide the Board in narrowing the pool and determining which individuals to invite back for a second interview. Second-level interview questions are drafted.
Second-Level Interviews Sunday, May 7, 2023 (Special Closed Session Board Meeting)	Second-level interviews conducted by the Governing Board, assisted by search advisers. The Board selects its preferred candidate. ESS notifies candidates who are not moving forward in the process.
Employment Contract Negotiations	Board identifies agency negotiators to draft an employment agreement for the Board’s consideration. Typically, the Board President and legal counsel are assigned to this role.
Validation Visit (Optional) Week of May 8, 2023	Board Subcommittee may decide to visit the workplace of the preferred candidate. ESS will assist Trustees and the finalist in scheduling this visitation. If a Board majority participates in the visit, it constitutes a meeting that must be properly noticed and agendaed.
Background Checks/ Social Media History	Search advisers utilize a third-party service to conduct an extensive pre-employment review of the finalist’s criminal, civil, credit, education, employment, and social media history.
Announcement of Board’s Preferred Candidate TBD	Following a favorable background check, ESS advisers collaborate with the Board President and finalist to develop a press release and announcement schedule contingent upon the finalist’s pending selection and Board approval.
Approve Employment of New Superintendent May 17, 2023 (Regular Board Meeting)	Governing Board takes formal action to hire the new Superintendent in closed session and approve the employment contract in open session, with a July 1, 2023 start date – or earlier date determined by mutual consent.
Start Date July 1, 2023	The newly hired Superintendent begins employment in the District.



**Transition Phase: July or August 2023 (TBD)**

Setting the Foundation for a Successful Transition	ESS advisers provide a facilitated transition meeting with the new superintendent and Board to review information gleaned during the search process and assist the governance team in identifying priorities and 'next steps' to move forward.
Optional Support Services	Depending on District needs and the experience of the new Superintendent, ESS advisers are available to provide Board governance workshops, superintendent goal-setting support, facilitation of the superintendent's performance evaluation, and/or executive coaching.

## **Section 3: Gathering and Using Community Input**

### **Stakeholder Focus Group Meetings**

Input will be gathered from staff, students, parents, and members of the greater CUSD community to inform the recruitment and selection process. ESS advisers will engage with various individuals and constituencies virtually, telephonically, and/or in-person based on participant availability and District preferences.

Once stakeholder groups are identified by trustees at our initial planning workshop, the following email will be sent from the Board's secretary to participants:

*The Governing Board has retained Dr. Suzette Lovely and Dr. Joseph Farley from Education Support Services (ESS) to facilitate the search for our next superintendent. Your voice is vitally important as we engage in a process to recruit and identify high quality candidates to lead Capistrano Unified into the future.*

*With this in mind, the search advisers would like to meet with you on **(date/time)** to seek your input surrounding three key questions:*

- 1. What are the best things about CUSD? What draws people here?*
- 2. What are some of the challenges or issues an incoming superintendent might need to be aware of?*
- 3. What unique skills or attributes are vital for CUSD's next superintendent to successfully lead the District into the future?*

*Please respond to this email to confirm your participation. If however, you are unable to attend this meeting but wish to speak with the Board's advisers, please include your phone number in your response so they may contact you.*

### **On-Line Community Engagement Survey**

In addition to stakeholder focus group meetings, ESS enlists input from all employees, parents, students, and the broader CUSD community through an on-line survey. A sample survey is provided on pages 10-12 of this proposal, with the caveat that the Board has the ability to modify or eliminate survey questions as deemed appropriate.

### **How is Community, Staff and Student Input Used?**

Data from Focus Group meetings and the on-line survey is synthesized into a *Leadership Profile* report. This report is organized around universal themes and serves as a blueprint for candidate recruitment, screening, and vetting. Stakeholder input is also used to:

- Understand current District needs/challenges from a variety of perspectives.
- Align/integrate trustees' priorities with stakeholder desires.
- Inform the Board's selection of its next superintendent.
- Provide a roadmap of essential actions for the newly hired superintendent.
- Hold up a mirror to the District's current culture and climate as a tool to organize for the future.

# Superintendent Search Community Engagement Survey



**Introduction:** The Capistrano Unified School District Board of Trustees is seeking staff, student, and community input in its search for a new superintendent. This survey is designed to gather your perceptions about the current state of the District along with the experiences and characteristics you believe are most important for the incoming superintendent to possess.

The survey is being conducted by outside search advisers who are assisting the Board in this important endeavor. All individual responses will remain anonymous.

## Section I: Participant’s Role

Please indicate your current role in the District (drop-down menu).

1. Administrator
2. Certificated staff
3. Classified staff
4. Parent
5. Student
6. Community member
7. Other

## Section II: State of the District

Please rate the overall quality of teaching and learning in CUSD.

Excellent	Above Average	Average	Below Average	Poor

In the next series of questions, please select the response that best describes your agreement with each statement. In determining your response, consider how the District has existed since any pandemic-related impacts or disruptions:

	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know
<b>1. The District provides a compelling vision for the future.</b>					
<b>2. The District maintains high expectations for student performance.</b>					
<b>3. The District is working to close achievement gaps.</b>					
<b>4. The District provides adequate resources to support student learning.</b>					
<b>5. Schools in our District are safe.</b>					
<b>6. District facilities are clean and well-maintained.</b>					
<b>7. The District engages the community as a partner to improve the system.</b>					
<b>8. Communication from the District is transparent and effective.</b>					
<b>9. The District embraces diverse racial, cultural, and socio-economic groups.</b>					
<b>10. The District is heading in the right direction.</b>					

**Section III: Expertise and Experience**

Below are specific areas of expertise that different superintendent candidates may possess. From your perspective, how much weight should the Board place on each area? Rate each area using the scale of importance.

	Critically Important	Mildly Important	Unimportant
<b>Teaching &amp; Learning</b>			
<b>Experience as a Site Principal</b>			
<b>Understanding School/Community Culture</b>			
<b>Negotiations/Labor Relations</b>			
<b>Fiscal Management</b>			
<b>Facilities Management</b>			
<b>Public Relations</b>			
<b>Board Governance</b>			

### **Section IV: Leadership Skills**

This next section asks you to consider the leadership skills of an effective superintendent. While all the skills are important, please select the five skills you feel are **MOST IMPORTANT**.

- Is present/visible throughout the District and community
- Is sensitive to and understands the needs of diverse learners
- Is a forward thinker and open to new ideas
- Is knowledgeable about best practices surrounding teaching and learning
- Is able to build a cohesive team
- Is able to work effectively with the Governing Board
- Develops a clear and compelling vision for the future
- Ensures the District remains fiscally solvent
- Maintains a culture of high expectations for students and employees
- Fosters a climate of trust and mutual respect
- Recognizes/celebrates staff contributions

### **Section V: Personal Attributes**

From your perspective, which personal attributes should be given the most attention by the Board when assessing applicants? While each quality may be important, please select the four that are **MOST IMPORTANT** to you.

- Approachable and personable
- Strong communicator
- Good listener
- Humble
- Honest and ethical
- Inclusive (seeks broad input in making decisions)
- Problem solver
- Resourceful
- Risk taker
- Sense of humor
- Tenacious (doesn't give up)

### **Section VI: Additional Considerations**

In choosing Capistrano's next superintendent, which path or strategy do you feel the Board of Trustees should take (Select only **ONE** answer):

Find a candidate who will stay the course and continue the work of the previous administration.

Find a candidate with the same general leadership style and educational philosophy as the previous administration, but who is able to make some necessary changes.

Find a different kind of candidate—someone who is ready to take the District in a significantly different direction.

What is the **single most** important issue the new superintendent will have to address upon taking the job with CUSD? \_\_\_\_\_

#### **Section 4: Primary Contact/Team Member Bios**

If ESS is selected to conduct the Capistrano search, Dr. Joseph Farley will serve as the Lead Adviser and primary contact for the Board.

### **Joseph M. Farley, Ed.D.**

**ESS Consultant**

**Education Support Services Group**

joefarley@outlook.com

949-244-0973



Dr. Farley is a consultant with Education Support Services Group (ESS). ESS provides a comprehensive menu of services for governing boards, superintendents, senior management teams, school districts, and community colleges. The divisions of service include: leadership and governance; executive searches; curriculum and instruction; human resource management; and business and fiscal services.

Starting as a high school teacher, Dr. Farley has over 40 years of public school experience, with his career culminating as the Superintendent of Capistrano Unified School District. During those years, he also served as a lecturer, adjunct professor on school law at CSU, San Marcos, and adjunct professor of Educational Leadership and Human Resources Development for San Diego State University.

Dr. Farley earned his bachelor of arts degree with a double major in Spanish and journalism from La Verne College. He holds a master of arts in educational administration from San Diego State University, an education specialist degree from Point Loma College, and a doctorate in educational administration from Northern Arizona University.

Dr. Farley has served in a number of advisory roles including: advisory board member for the College of Education, Cal State, Fullerton; advisory council member for the School of Education, Brandman University; and board member/secretary, Anaheim Prep Sports/Activities Foundation. He has also been an expert witness for employment-related litigation cases for various Southern California law firms.

Dr. Farley is the recipient of the Distinguished La Verne Educator Award and the Point Loma College “Educap” Award for his leadership development in San Diego County. As a sought-after speaker, Dr. Farley has numerous keynotes and presentations to his credit including Los Amigos of Orange County; Cal State Fullerton; Capistrano Unified Council of PTSA’s Hot Topics in Education; and Preparing Future Leaders for OCDE. He also appeared on KPBS’s *Full Focus* as an expert panel member on school finance. Dr. Farley is a prolific writer with numerous publications in state and national journals.

Dr. Farley has extensive experience conducting superintendent and top-level leadership searches. He regularly coaches new superintendents and provides various workshops, including ones on superintendent evaluations and board governance.

**Suzette Lovely, Ed.D.**  
**ESS Consultant**  
**Education Support Services Group**  
**slovely@aalrr.com**  
**949-283-7862**



Dr. Lovely is a consultant with Education Support Services Group (ESS). ESS provides a comprehensive menu of services for governing boards, superintendents, senior management teams, school districts, and community colleges. ESS offers direct support in: leadership development, governance, executive searches, labor relations, human resource management, fiscal services, and facility planning.

Dr. Lovely's career spanned 35 years working in TK-12 public schools. Her love of teaching first materialized while serving as an instructional aide during her early college years. Following her undergraduate work at UC, Irvine, Dr. Lovely spent 27 years as a teacher, assistant principal, principal, director, deputy superintendent, and acting superintendent in Capistrano Unified School District. In 2009, she became Assistant Superintendent of Human Resources in Placentia-Yorba Linda. Dr. Lovely rounded out her public education journey as Superintendent in Carlsbad Unified School District.

Dr. Lovely holds a master's degree in educational administration from National University and a doctorate from Cal State University, Fullerton. She has trained and mentored hundreds of teachers and aspiring school leaders with affiliations at: Cal State University, Fullerton; Chapman University, Brandman University/UMASS Global; School Superintendents Association (AASA); Association of California School Administrators (ACSA); and Orange County Department of Education (OCDE).

During her superintendency, Dr. Lovely spearheaded several efforts to engage stakeholders in the work of public education including: opening the district's second high school; implementation of a \$13 million county-wide Career Pathways Trust Grant; facilitation of the Legislative Action Network (LAN) to engage state/local legislators in public policy discussions; and collective impact work with industry giants Qualcomm, Viasat, Taylor Made, and Thermo Fisher. Dr. Lovely was among a select group of San Diego superintendents invited to meet with the Governor to discuss LCAP implementation, ESEA reauthorization, and state education priorities.

Dr. Lovely remains active in strategic planning work, leadership coaching, and executive searches. She is the author of four books and numerous articles on topics of the day. As co-founder of the Women in Education Leadership (WEL) Network and AASA's Aspiring Superintendent Academy for Female Leaders, she is committed to helping women unlock their full potential as they rise through the ranks. Dr. Lovely has been recognized for her influence and service by Senator Patricia Bates, the California PTA, the Hi-Noon Rotary, the Carlsbad Chamber of Commerce, the San Diego County Art Education Association, the Master Teacher organization, and Chapman University.



**Section 5: Scope of Work/Search Fee**

Below is a summary of activities that will occur within each phase of the search along with the total fee for all services rendered.

<b>Summary of Activities</b>	<b>Proposed Fee</b>
<b>Engagement Phase</b>	
Conduct superintendent salary study	
Prepare/facilitate Board planning workshop to: review salary data/comps; establish salary parameters; identify stakeholder groups; discuss prospective candidates; confirm timelines and corresponding activities; etc.	
Conduct Stakeholder Group meetings (virtual, in-person, and/or telephonic)	
Collaborate with PIO to create superintendent search webpage and update information throughout process	
<b>Activation Phase</b>	
Candidate outreach and communication	
Prepare/distribute on-line survey; disaggregate/analyze results; develop <i>Leadership Profile Report</i>	
Prepare/Present <i>Leadership Profile</i> findings to Board, community, and prospective candidates	
<b>Selection Phase</b>	
Candidate correspondence; applicant screening; reference checks; blind appraisals; preparation of application packets for Board review	
Meet with Board to determine candidate slate; finalize first-level interview questions	
Candidate Interviews (first and second level); Board deliberation; selection of finalist	
Support employment contract negotiations with Board President & legal counsel	
Correspondence with all candidates, develop announcement schedule, draft press release	
<b>Transition Phase</b>	
Plan/facilitate Transition Meeting with Board and newly appointed Superintendent	
<b>Other/Misc.</b>	
Weekly updates and outreach w/Trustees	
Third-Party Due Diligence Report	
Comprehensive Social Media Review (Third party)	
Travel and expenses	
<b>Total Cost NTE</b>	<b>\$28,500</b>

# Appendix A

## Client Letters of Endorsement

**Education Support Services Group**  
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John A. Bowes, Ed.D.  
Superintendent

*Board of Trustees*  
Jason Boxer  
Jennifer Cochran

**District**

Jen Fenton  
Cathey Graves  
Sally Peel



**Manhattan Beach Unified School**

325 South Peck Avenue Manhattan Beach, California 90266

To Whom It May Concern:

August 16, 2021

Last spring, while managing school re-openings, in-person and distance learning platforms, curriculum changes, and second interim budget reports, the Board of Trustees for the Manhattan Beach Unified School District (MBUSD) was given an additional task. Our incredible Superintendent for over eleven years decided he would not be renewing his contract in June, and thus we needed to find a new leader. What felt impossible, given our own self-imposed deadline of hiring someone by July 1, was met with ease and professional integrity from the moment ESS submitted their RFP.

After reading eight applications from search firms across the nation, ESS stood out as the frontrunner. In addition to their experience with similar districts, they researched our community, watched previous board meetings, and had an expansive network of potential candidates to recruit from. During the public interview, ESS continued to shine. The firm presented a comprehensive timeline that corresponded to our district's calendar, explained the level of engagement and listening that would be conducted with various stakeholder groups, and most importantly talked about utilizing this search process as a road for healing.

And as soon as ESS was hired, they prioritized MBUSD and finding our new Superintendent. In addition to analyzing previously compiled survey data about desired characteristics or experience from students, parents and staff, ESS drafted a supplemental constituent questionnaire to develop a leadership profile and job description. ESS simultaneously conducted a compensation study and immediately began scheduling meetings with focus groups consisting of over 220 people. At every step of the way, our consultants provided in-depth updates, communicated regularly with the board, and made presentations at meetings to inform the public about the search.

As July 1 drew near, ESS remained calm, focused, and continued to demonstrate a level of expertise that aligned with our district's goals. They brought several highly-qualified candidates to the board for consideration and did extensive background research on each applicant. Not only did ESS coordinate two back-to-back days of interviews, they helped guide our conversation as we deliberated, for several hours, on which individual would best serve our district.

When our new Superintendent was finally selected, by the deadline we set, the consultants prepared a press-release, created a multi-tiered action plan to disseminate the news, and checked in daily to ensure a smooth transition. ESS constantly supported the board with resources that went beyond the scope of our search, and developed long-term relationships with those in our district. In fact, if we could hire ESS for every task or issue that falls within the scope of the board's purview, we would!

Our experience with the firm was truly exceptional from start to finish. And while it was sad to say goodbye to the former Superintendent, the board is confident that we found the best person to lead MBUSD into the future.

Best,

A handwritten signature in blue ink, appearing to be "Jen Fenton", written over a light blue horizontal line.

Jen Fenton  
Manhattan Beach Unified School District, Board President



**Board of Trustees**

**Kathy A. Thompson**

President

**Joan R. Weiss**

Board Clerk

**Stacy C. Henry**

Trustee

**Hugh M. Jackson**

Trustee

**Vacant**

Trustee

**Administrators**

**Amy Nguyen-Hernandez**

Superintendent

**Lizette Diaz**

Assistant Superintendent,  
Student Achievement /  
Educational Services

**Michelle Dynes**

Assistant Superintendent,  
Human Resources /  
Safety Preparedness

**Lori L. Isom**

Assistant Superintendent,  
Business Services

There is no more important undertaking for a board of trustees than the search and hiring of a new superintendent. The Central School District has been fortunate to have had many years of stability, and our most recent superintendents have all come from within the organization. This made the task even more daunting for us. It was critical that we found a search firm that could help us find the perfect match for our district and its needs.

The Education Support Services Group became that firm for us. Having known Dr. Gary Rutherford for many years in mutual groups within the county, there was a fantastic basis of trust. Dr. Suzette Lovely was the perfect partner and the two were able to work together to determine the interests and needs of our district and reach out to those that could meet those needs.

The multi-step approach to the search was thorough in every detail. A clear overview of the services that would be provided allowed us to know every step of the process. The four phases, Engagement, Activation, Selection and Transition helped us as a district to determine our focus, refine our priorities and hear from all stakeholders. The board was involved in each phase and had input on everything from questions to be asked, whom to reach out to and timelines that would be most effective. Drs. Rutherford and Lovely provided frequent updates and were available anytime the need for clarification or concerns arose.

As president, what I most appreciated was the personal care that was taken to make sure that every trustee was involved, and their concerns and priorities were heard. No issue was too small or deemed inconsequential. There was a mutual goal to find just the right person to take us into the future. Every effort was taken to ensure that we got to that result. Having ESS do the candidate screening, background checks and their knowledge of local professionals was a great reassurance to us as trustees, as there is no more valuable asset than the reputation of the district.

Our district is excited as we anticipate the future with our new superintendent. We look forward to forming a new governance team and know that we can reach out to ESS should the need arise. Drs. Rutherford and Lovely took an overwhelming task and made it a very positive experience for us as a leadership team. We are unified and ready to move into the future with great confidence for success for all stakeholders.

Kathy Thompson  
President, Board of Trustees



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August 18th, 2021

To whom it may concern,

It is my absolute pleasure to recommend Education Support Services Group's (ESS) Beverly Hempstead and Suzette Lovely as extremely competent and capable experts for any district engaged in a superintendent search. The San Marcos Unified School District Governing Board was fortunate to employ ESS through the 2020-21 school year as we searched for our next superintendent, and I cannot recommend them highly enough.

With three newly elected Board members, there was a lot of learning for us. Beverly and Suzette provided clear direction on the importance of finding the perfect superintendent during a difficult time when the district was absent of leadership. These incredibly professional women took us step-by-step through the process of defining what we were looking for in a candidate, collecting information from all stakeholders, and compiling this information to create a job posting that would cast a wide net.

Suzette and Beverly directed the Board through a painstaking process of vetting dozens of highly qualified applicants to narrow down the search. They took their time to help us understand the process, see things from multiple angles, and helped us create an interview process that landed the perfect candidate for our district.

ESS was consistent with their messaging, very professional in every interaction, and demonstrated a deep understanding of this process which made every step a learning experience for all our board members. I believe the extensive experience both Beverly and Suzette have as former superintendents provides them with a unique perspective from which both new and existing board members will greatly benefit.

As a board member I was always fully informed as the process unfolded, with open lines of communication from beginning to end. I don't know how we would have completed the task of hiring a new superintendent without their assistance and guidance. I would highly recommend ESS and I look forward to working with them again.

If you have any questions, please feel free to contact me.

Sincerely,

Jaime Chamberlin

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Governing  
Board:

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Stacy Carlson

Jaime  
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Sydney Kerr

Carlos Ulloa,  
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Andrew S. Johnsen, Ed.D., Superintendent