

**FALL RIVER JOINT UNIFIED SCHOOL DISTRICT  
BOARD OF TRUSTEES  
SPECIAL MEETING**

DATE: January 17, 2011  
 TIME: 6:00 PM  
 LOCATION: Soldier Mt.  
 44144 A Street  
 McArthur, CA

**AGENDA**

Individuals wishing to address the Board should register prior to the start of the meeting.

<b>1.</b>	<b>CALL TO ORDER</b>
<b>2.</b>	<b>ROLL CALL; ESTABLISH A QUORUM; SALUTE FLAG</b>
<b>3.</b>	<b>ADOPT AGENDA</b>
<b>4.</b>	<b>PUBLIC COMMENT</b> Opportunity for members of the public to address the Board. Note: 1) Individual speakers will be allowed three (3) minutes to address the Board. The maximum time allowed for each agenda item shall be 20 minutes. 2) Complaints presented to the Board must not involve specific reference to employees. Citizens should contact the Superintendent for complaint procedures regarding employees. 3) A school district cannot take action on a matter that has not been placed on the official agenda. (G.C. 54954.2)
<b>5.</b>	Review proposals to conduct a Superintendent Search <ol style="list-style-type: none"> <li>1. Zampi, Determan &amp; Erickson LLP</li> <li>2. Dave Long &amp; Associates</li> <li>3. Shasta County Office of Education</li> </ol>
<b>6.</b>	Consider approval of Superintendent Search proposal
<b>7.</b>	<b>ADJOURNMENT</b>
	<p><b>Copies of the agenda, complete with backup materials, may be reviewed at the District Office. A schedule of the meetings, agendas and minutes can be reviewed on the District's website: <a href="http://www.frjUSD.org">www.frjUSD.org</a></b></p> <p>REASONABLE ACCOMMODATION FOR ANY INDIVIDUAL WITH A DISABILITY  <i>Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in a meeting, may request assistance by contacting the Fall River Joint Unified School District, 20375 Tamarack Ave. Burney, CA 96013; telephone 530-335-4538; fax 530-335-3115</i></p>

**ZAMPI, DETERMAN &  
ERICKSON LLP**

**CONDUCTING  
A  
SUPERINTENDENT  
SEARCH**

**FOR THE**

**FALL RIVER JOINT UNIFIED  
SCHOOL DISTRICT**

*Presented By*

**ZAMPI, DETERMAN & ERICKSON LLP**

NBC Tower  
225 Broadway, Suite 1450  
San Diego, California 92101  
(619) 231-9920  
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Law Firm of  
**Zampi, Determan & Erickson LLP**

A California Limited Liability Partnership

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PATRICK J. PHILLIPS  
DANIEL C. LOWE  
CHRISTINA C. RENTZ

December 13, 2010

Board of Trustees  
Fall River Joint Union School District  
20375 Tamarack Avenue  
Burney, California 96013

Re: Services for Superintendent Search and Selection

Dear Members of the Governing Board:

Our firm is pleased to respond to your request for a proposal to conduct the search and selection process for Superintendent of the Fall River Joint Union School District. Unlike firms, our approach is not to "take over" the search process, but rather, to coordinate consulting efforts with the existing administrative and clerical staff. We have successfully applied this approach in numerous other districts where our firm provided search consulting services to the existing staff. The advantages of this form of service are substantial:

- It substantially limits costs (estimate \$5,000 - \$10,000)
- Coordination of District staff
- The ability to maintain attorney-client privilege regarding certain aspects of the search
- The ability to perform extensive confidential background investigation of candidates
- The ability to identify and draft employment contract provisions consistent with Board directives

Given more than twenty-five years of experience representing California school and college districts, we believe our firm has demonstrated a substantial understanding of the policies, individuals, and board requirements for the day-to-day workings of school districts. Our proposal will demonstrate that we possess the experience and expertise necessary to assist the District in its existing personnel and departmental structure with a successful recruiting and selection of the next Superintendent.

If selected, we are prepared to expedite your search which will ensure the existing vacancy does not languish in the absence of the appointment. To that end, we propose an aggressive recruitment timeline in order to recruit and select the successor Superintendent. We are keenly aware that the continuity of effective leadership is critically important for the District to support the needs of its students and community.

Law Firm of  
**Zampi, Determan & Erickson LLP**  
A California Limited Liability Partnership

Members of the Governing Board  
December 13, 2010  
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The following is a brief summary of the comprehensive search services which will be tailored to meet the District's specific needs and to which we would consult with and assist the District administrative and clerical staff:

1. Meeting with the Board to develop criteria, to review needs, and to participate in a planning session.
2. Drafting an attractive brochure unique to Fall River Joint Union School District.
3. Conducting a statewide or nationwide search.
4. Receiving applications and confidential papers.
5. Assembling files and providing paper-screening services.
6. Coordinating screening committee.
7. Meeting with the Board to review screening results.
8. Meeting with the Board when it determines which candidates to interview.
9. Assisting and coordinating interview committees.
10. Notifying candidates and setting up and/or participating in interview.
11. Extensive confidential investigation of candidate's legitimacy.
12. Sending regret letters to nonfinalists and unsuccessful candidates.
13. Preparation of a draft employment contract and negotiate the employment terms.
14. Meeting with the Board in relation to any of the above whenever the Board feels it is necessary. (Any additional tasks that the District feels are necessary would also be included.)

We would communicate throughout the process with the Board and would keep applicants apprised of the status of their files as well as provide them with District information, as appropriate.

Law Firm of  
**Zampi, Determan & Erickson LLP**  
A California Limited Liability Partnership

Members of the Governing Board  
December 13, 2010  
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The District would, at all times, remain in control of the process. We serve only as the advisor and consultant to the District and are prepared to share the judgment, knowledge and document production abilities gained from over 25 years of educational experience including recruiting staff and management personnel for school districts and colleges.

A state or nationwide search will be conducted with the help of our key contacts to assist the District in recruitment of qualified applicants. Our experience, network, and research capacity can assure the Board that candidate reference checks will be done thoroughly and confidentially.

Our firm is prepared to develop with you a personalized time line and suggested search plan to meet the District's needs and priorities.

We are looking forward to meeting with you to share the details of our thorough and effective process.

Very truly yours,



REX RANDALL ERICKSON

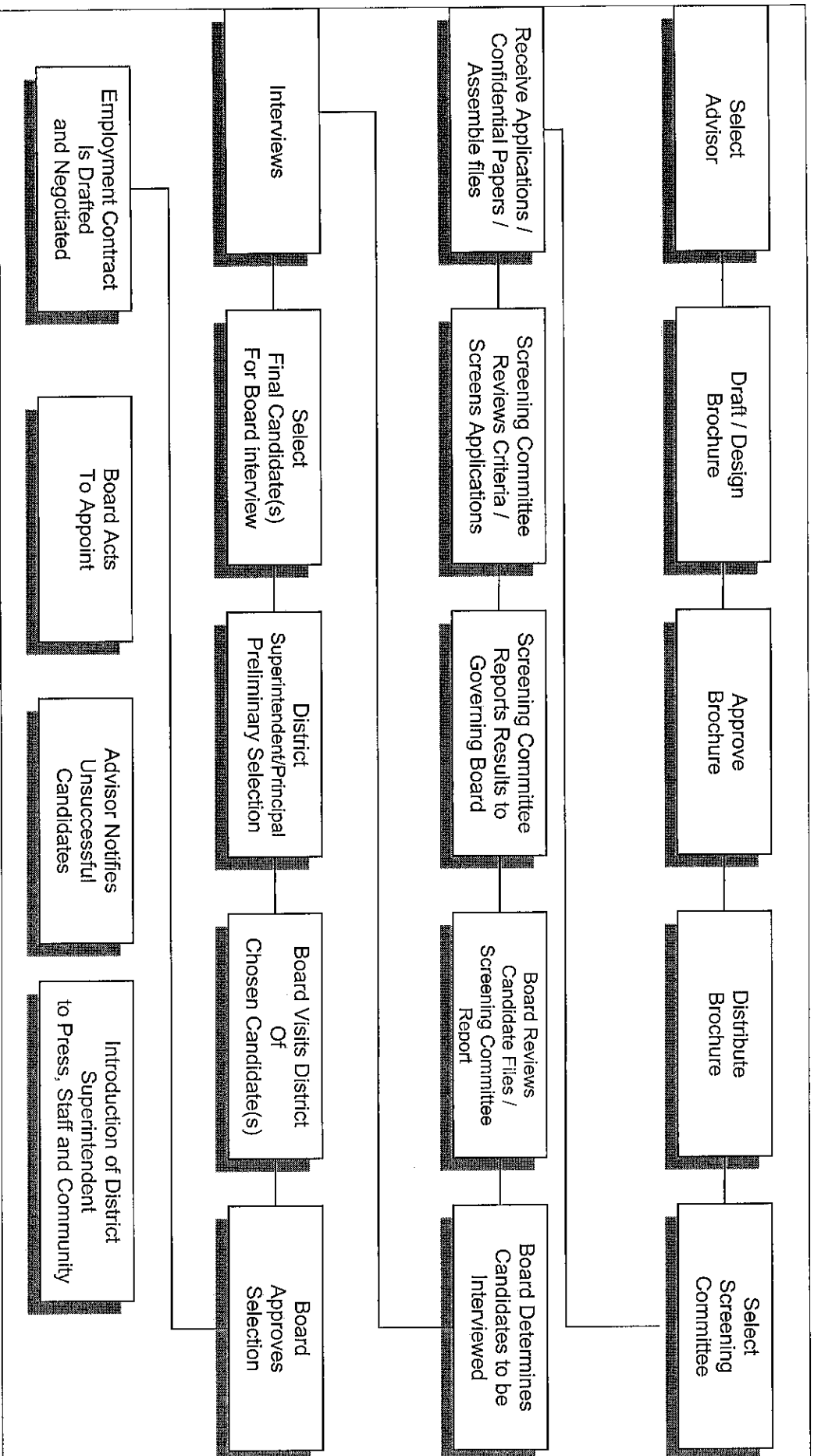
## PROCESS FOR SELECTION OF SUPERINTENDENT

1. The Governing Board, having made a decision to hire a District Superintendent, designates the advisor/consultant to assist in the recruitment and selection process. The advisor will consult with and assist the District administration and clerical staff and meet with the Board to discuss in detail the recruiting and selection process, to develop criteria, and develop the timeline, budget and scope of the search.
2. Based upon information received from the Board, the advisor will consult with and advise the Human Resources Department in the development of drafts of a brochure advertising the position.
3. The Board will receive the draft brochure and approve the selection criteria and time line.
4. The brochure will be mailed to all California high school districts, as well as placement offices; and will be published in various professional publications advertising the vacancy.
5. The Board will decide upon the selection of a paper screening committee.
6. Applications shall be received, and a file maintained for each applicant. Applicants are notified two weeks prior to the closing date as to the status of their file, i.e., all of the materials stated in the brochure have been received.
7. The advisor will meet with the screening committee to review the criteria for the position. The Board will have an opportunity to prioritize the criteria or emphasize certain desired qualities.
8. The screening committee members read each applicant's file. Based upon the criteria adopted by the advisor and Board, screeners shall assign each file a rating.
9. The screening committee members meet with the Board to give their report and discuss the reasons for the numerical rating they assigned to each file. The screening committee shall not rank-order the candidates.
10. The Board, after hearing the report of the screening committee, shall review the report and study the candidates' files.
11. The Board, based upon the study of the files and discussion with the screening committee, as appropriate, determines which candidates should be interviewed. The advisor will notify the candidates and makes the necessary arrangements for interview.
12. An interview committee shall be appointed to interview those candidates selected. Each candidate should be asked the same questions. The advisor will assist with the preparation of questions as needed.
13. At the conclusion of the interviews, the interview committee reviews all available information and tentatively selects two or more finalists.
14. The Board interviews the recommended finalists, including any additional candidates determined by the Board.

15. It is essential for the Board to direct the law firm to do a thorough background check and investigation of the chosen candidate(s). Generally no other screening or selection process is as effective in uncovering essential evidence of successes and failures as a thorough investigation by the Board's lawyers.
16. The Board, following the interviews and background investigation of the final candidate, should now be in a position to make the final selection of a top candidate.
17. The Board determines the selection of the District Superintendent.
18. The Board shall direct the advisor in the preparation of an employment contract.
19. The advisor shall negotiate the terms directed by the Board of the employment contract with the selected candidate.
20. When the candidate has accepted the position, and the Board acts to appoint, written statements should be released to the media announcing the selection and appointment.
21. A letter from the Board should be sent to each unsuccessful applicant, expressing appreciation from the Board and notifying them of the selection. This is generally prepared for the Board's signature by the advisor.
22. Throughout the entire process, the Board's lawyer(s) shall advise on legal aspects of the process including Brown Act, open meeting laws compliance.

# FALL RIVER JOINT UNION SCHOOL DISTRICT

## District Superintendent Selection





**FALL RIVER JOINT UNION SCHOOL DISTRICT  
SUPERINTENDENT SEARCH 2011  
(Projected Timeline for Selection Procedure)**

<b><u>PROJECTED DATE for COMPLETION</u></b>	<b><u>TASK</u></b>
<u>Jan</u>	Notification to Zampi, Determan & Erickson LLP
<u>Feb</u>	Notification to ACSA
<u>Feb 10</u>	Develop job flyer/announcement
<u>Feb 15</u>	Develop selection criteria (brochure plus staff, trustee, community input)
<u>Feb 10</u>	Develop application
<u>Feb 11</u>	Distribution of job announcement to high school and unified districts in CA
<u>Feb</u>	1 <sup>st</sup> Posting of the position on EdCal
<u>Feb</u>	2 <sup>nd</sup> Publication in EdCal
<u>Mar</u>	3 <sup>rd</sup> Publication in EdCal
<u>Mar</u>	4 <sup>th</sup> Publication in EdCal
<u>Mar</u>	5 <sup>th</sup> Publication in EdCal
<u>Mar 31</u>	Tentative application deadline
<u>Apr 10</u>	Select paper screening committee (confidentiality statement)
<u>Apr 15</u>	Paper screening completed
<u>Apr 30</u>	Candidates recommended to the Board
<u>May 12</u>	Board selection of candidates to oral interviews
<u>May 30</u>	Board makes tentative selection subject to visitation and employment contract
<u>Jun 10</u>	Visitation to the district of the finalist
<u>Jun 11</u>	Begin negotiation of contract
<u>Jun 30</u>	Selection made and board approved

## **FEE STRUCTURE**

The Law Firm of Zampi, Determan & Erickson LLP makes the following fee arrangement available to the Fall River Joint Union School District for the purpose of assisting the District recruit a qualified candidate for the position of Superintendent.

1. The firm will conduct a state or nationwide executive search to recruit qualified candidates for the position of Superintendent.
2. The firm will organize and facilitate the selection process to enable the Governing Board and the membership of the technical interview team to participate in the selection process.
3. The Law Firm of Zampi, Determan & Erickson LLP agrees to provide the above-referenced services at the existing fee contract and an estimate of \$5,000 - \$10,000 but with a maximum for this service not to exceed \$10,000 regardless of the amount of time necessary.
4. All other necessary expenses such as the posting of the advertisement in trade and professional publications, travel, meals, and lodging, including but not limited to visitations to candidate's current employment district, the printing of the recruitment brochure, printing of the candidate application form if not provided by the District and postage will be billed back to the District at the actual cost of the incurred expense.

## PROJECTED COST ESTIMATE

The charges for service to the Fall River Joint Union School District will not exceed \$10,000.00. The cost of having the brochure printed and necessary postage as well as other expenses associated with the search shall be paid by the District or reimbursed if paid by the firm.

### Estimated Costs of Options

Employ a search firm to assist the Human Resources Department to conduct the search

#### Costs:

- Search Firm Fee at the existing hourly rate at a maximum not to exceed \$5,000.00 – \$10,000.00
- Advertising (estimated District expense) \$8,000.00 – \$12,000.00
- Printing (estimated District expense) \$2,000.00 – \$2,700.00
- General expense (estimated District expense) \$1,000.00 – \$2,500.00

Zampi, Determan & Erickson LLP will provide the necessary assistance, coordination and consultation necessary to implement and carry out the following search, recruitment and selection process for Superintendent of Fall River Joint Union School District:

1. Meeting with representatives of various citizen and District organizations and committees to identify the personal and professional qualifications desired in the next Superintendent.
2. Advertise the position with various registries and advertising companies as well as networking throughout the state by contacting individuals who would be knowledgeable about potential candidates.
3. Distribute all necessary application materials to interested candidates.
4. Provide initial paper screening will return applications using benchmark characteristics approved by the Board.
5. Facilitate the initial screening process with representatives from District and citizen organizations and committees.
6. Identify candidates who should be invited for personal interviews.
7. Contact finalists to establish interview dates and times and coordinate with interviewer and members of the interview panel.
8. Notify unsuccessful candidates of their status in the interview process.
9. Conduct a confidential background investigation of finalist candidates.
10. Notify all finalists of their status prior to the public announcement of who is actually going to be offered the position of Superintendent/President.
11. Draft the employment contract as directed by the Board and negotiate employment terms with the selected finalist.

# FALL RIVER JOINT UNIFIED SCHOOL DISTRICT

## PROPOSAL FOR SUPERINTENDENT SEARCH



**Dave Long & Associates**

**636 Loretta Drive**

**Laguna Beach, CA 92651  
(916) 616-6027  
(760) 219-5873**

**[www.DLAssoc.com](http://www.DLAssoc.com)**

**December 2010**



**Dave Long & Associates**

636 Loretta Drive  
Laguna Beach, CA 92651

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# Executive Search Services

December 16, 2010

Board of Trustees  
Fall River Joint Unified School District  
Mrs. Teri Vigil, Board President  
20375 Tamarack Ave.  
Burney, CA 96013

Dear Mrs. Vigil and Trustees:

Thank you for expressing an interest in Dave Long & Associates possibly assisting the Fall River Joint Unified School District Board of Education in conducting a search for its next superintendent. We are extremely interested in working with you in this important endeavor.

Before describing our services, I would first like to introduce myself and our firm. My professional career has spanned over 40 years and includes a background of experiences in classroom teaching and administration. I have served as assistant principal, school principal, assistant superintendent, district superintendent, county superintendent of schools and most recently Secretary of Education for the State of California. These experiences have made it clear to me that the superintendent of schools and school board establish a foundation for effective governance. Ultimately this provides vital leadership for the school system to serve children and the community. Thus, hiring a superintendent is one of the most important decisions your Board will ever make. I have a strong desire to assist you in this important function.

As you may know, the California School Boards Association has curtailed its involvement in superintendent searches. My firm has been fortunate to acquire the services of their top consultants, all who have enjoyed distinguished careers in education. They bring a rich background of success in having served as lead search advisers for many school districts throughout the state. For several years prior to that, they each assisted in executive searches by acting as professional screeners. Recently we added the services of other retired superintendents who have enjoyed long, successful careers in California public school districts.

Mrs. Vigil and Trustees  
December 16, 2010  
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I am also a search consultant having performed those duties as a county superintendent of schools and after as a Dave Long & Associates Executive Search team member. I believe our unique backgrounds, experiences, and relationships developed over decades working as superintendents and search advisers bring a high level of expertise to the executive search process. Our team of consultants and associates appreciate the uniqueness of each district and will design our search processes to be flexible in order to meet your needs.

We are particularly proud of our ability to recruit a diverse candidate pool that not only meets the leadership profile set by the board, but is reflective of the composition of the communities served by the district. Through their extensive professional activities, our consultants and associates maintain contacts with individuals who are representative of our state's diverse population. This sophisticated network of contacts is enhanced by a strong recruitment campaign. We are committed to recruiting a field of candidates that is reflective of the qualities, traits, experiences, background and training sought by the board in its next superintendent. Our guarantee is that if the board is not satisfied with its pool of candidates following interviews, we will continue the search for expenses only.

If Dave Long & Associates Executive Search Services is selected to assist you in the search, subject to Board approval, Mr. Barry Reed will be the lead consultant advising the district with the assistance of our full consultant and associate staff. He is very familiar with your area and the school districts contained within it. A brief bio is attached.

**Our all inclusive fee will be \$13,600 to conduct the search as described in our recommended approach.** This includes all consultant expenses; distribution through the Internet of a basic brochure; advertising on websites and in publications of the Association of California School Administrators (ACSA) *EdCal*, School Services of California and Dave Long & Associates; through our extensive networks aggressively recruiting candidates who meet the Board's leadership profile; correspondence with candidates; assistance with development of interview questions; scheduling of appointments; and other activities associated with the search. It also includes **at no additional cost** a leadership transition workshop with the Board and the new superintendent at the conclusion of the search.

You will find that this proposal provides an excellent overview of our services – services that can be modified in accordance with the highest standards of professionalism and your wishes. Our fundamental goal is to assist the Board in making the right match of a superintendent for your district and community.

Mrs. Vigil and Trustees  
December 16, 2010  
Page three

The dedication of our advisers to finding the best match of candidates and the Board adopted leadership profile accounts for our high rate of success. Of all the searches conducted by our advisers over the last five years, 95% of the superintendents selected for these positions are still serving in those roles.

If you have any questions about Dave Long & Associates Executive Search Services or our proposal please feel free to contact Dr. Diedrich at (760) 219-5873, Mr. Barry Reed (916) 212-9905 or me at (916) 616-6027.

Sincerely,

David Long, President  
Dave Long & Associates Executive Search Services

*Dave Long & Associates*

*Executive Search Services*

*is pleased to provide a proposal to the*

***FALL RIVER JOINT UNIFIED SCHOOL DISTRICT***

***Board of Trustees***

Teri Vigil, President

Valerie Lakey, Clerk

Randy Oller, Member

Cindy Ronquist, Member

Ignacio Venegas, Member





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## **DAVE LONG & ASSOCIATES EXECUTIVE SEARCH SERVICES**

***Reasons why you should choose Dave Long & Associates Executive Search Services (ESS) to assist you in the most important decision you will make as a Board . . . the selection of a new superintendent.***

***We're accountable to you . . . and you are in control . . .***

As your advisor, DLA ESS works for you. The Board is the decision-maker, and the advisers provide logistics and vital information to the Board with which to make the best decisions. From the initial planning meeting and throughout the entire process, DLA advisers will work with you and will be available to guide you and provide direction as needed.

***We develop a leadership profile . . .***

Gathering information from all stakeholders in the district is one of the first and most important steps in our process. All individuals in the community – including board members, faculty, parents, and staff members – are encouraged to set up an interview with the DLA advisers to discuss the characteristics they would like to see in a new superintendent. Individuals representing groups such as bargaining units, the PTA, site council, etc., are encouraged to meet with the advisers. In addition to the interviews, the advisers may also visit various sites, hold group meetings and/or open forums, or any combination of those activities. The advisers may also receive written input from all segments of staff and the community.

***We use our network to aggressively recruit top candidates . . .***

Our DLA advisers, all former distinguished superintendents of schools, have had long, successful careers in education. We continue to maintain contacts and a sound network across California and the nation. Participation at conferences and workshops helps us to maintain contacts and develop new relationships with highly talented individuals. We aggressively recruit candidates, many who might not be seeking a new position, who meet the leadership profile adopted by the Board.

***Our application process is rigorous . . .***

Applicants are asked to respond to challenging questions and demonstrate their experience in educational leadership. Applicants provide copies of their degrees and credentials for verification as part of the process.

***We use professional paper screeners . . .***

DLA ESS uses professional screeners to paper screen the applicants against the criteria and leadership profile established by the Board. The screening process is

designed to optimize the objective assessment of professional qualifications and experience.

-1-

***We share all application materials from candidates with the Board . . .***

DLA ESS maintains an open, transparent search process with the Board while ensuring maximum confidentiality for candidates. A critical part of that process is to make available to the Board all application materials received from candidates prior to determining which individuals will be invited for interviews. Our credo is “no surprises.” The Board is in charge of the selection process and must be privy to all information that will help make the important decision of who will be its next superintendent.

***We do thorough reference checks . . .***

It is past performance, more than anything else that will predict future success. A candidate’s track record is the best indicator of how he or she will perform as superintendent in your district. After a review of all applicant files, the professional screeners will develop a list of individuals who most closely meet the leadership profile. They will conduct employment and reference checks on those individuals and present recommended candidates for first round interviews, sharing with the Board the results of the reference checks.

A national organization will conduct a federal criminal search, SSN trace, credit report, state and federal sex offender registry, and motor vehicle background checks on the finalist to be offered the position. That individual will be asked to provide certified transcripts that verify his/her academic degrees and proof of administrative credential(s) in order that the district can complete its final employment process.

***We actively involve stakeholders . . .***

Community/Staff Engagement is included in our standard contract. It requires time in the district for the advisers to gather information about the district and its needs. There are variations of community engagement in the search process that may be selected by a Board. These would include, but are not limited to:

***Community/Staff Engagement Standard Version . . .***

This process includes:

- Development of advertising, data-gathering and other materials
- Individual meetings with board members
- Individual meetings with key district office and site leadership
- Individual meetings with association/union leadership

- Individual meetings with key stakeholders: parent/community/business leadership
- An open forum for general public and internal staff
- Web-based survey on district website
- Telephone interviews with key stakeholders unable to be present for individual face-to-face interviews or group meetings
- Compilation of input received through questionnaires distributed at various school district offices or e-mails sent to the adviser

***We communicate with the Board throughout the entire process . . .***

DLA advisers pride themselves on maintaining ongoing and timely communications with the Board throughout the entire search process. Board members will be provided with each adviser's e-mail address, cell phone number, and home contacts. In most cases an inquiry will be responded to within 24 hours, most often in a matter of hours. The advisers will also share questions from individual Board members and the answers with the entire Board in order that each member is fully apprised of the progress of the search. Our advisers will provide periodic written updates to the Board throughout the search.

***We facilitate the community visit of the prospective Superintendent . . .***

To affirm your choice, the entire Board, or a subcommittee of the Board, is encouraged to visit the community of the finalist. The search advisers will facilitate the visit but do not normally join the Board in the actual visitation.

***We value and maintain confidentiality and communication . . .***

Our search process is confidential. Confidentiality is also a top priority with the candidates' files. All applicant files are maintained in a secure area.

***We assist the Board and its legal counsel in contract discussions with the successful candidate . . .***

If the Board wishes, the advisers will provide assistance to the parties as the contract of employment is drafted and negotiated with the successful candidate. Our advisers, although not attorneys, know typical superintendent contract provisions desired by both candidates and boards. Even though DLA and its advisers stand ready to assist the Board, we urge boards to follow the advice of their district's attorney.

***We provide at no additional cost a Board/Superintendent workshop at the conclusion of the search . . .***

Upon selection of your new superintendent, a DLA adviser will provide your Board and the superintendent with a three-hour workshop to help the new governance team forge an effective working relationship. This helps the governance team immediately create a climate for open communication, develop preliminary protocols, and establish a customized orientation/transition plan. **This important workshop is included at no additional cost to the district.**

***We maintain contact with the new superintendent and Board after the search has been completed . . .***

Once the search has been completed, Dave Long & Associates Executive Search Services advisers maintain contact with the new superintendent and governing board for a period of up to two years. One of the reasons our advisers have such an outstanding record of successful searches where the new superintendents have withstood the test of time is due to our follow-up contacts. For the most part these are of an informal nature at no extra cost to the district. Our main goal is to ensure that the working relationship among the parties continues to be positive.

***Boards who have been assisted by our advisers hire superintendents who enjoy lengthy, successful careers with the district . . .***

When one examines the total number of searches performed by our advisers over the last five years, they find that 95% of the superintendents selected by these school boards are still successfully serving in those positions. This lengthy tenure is virtually unheard of in the search field. We attribute this high rate of success to extensive work done by our advisers in the search process to obtain a good match of the candidate with the board and follow-up contacts to ensure that the parties perform well as a governance team.

***We offer additional services beyond the executive search services . . .***

In addition to conducting executive searches, Dave Long & Associates provides a number of additional services to school districts. Our firm has three components. These are The Achievement Group, The Leadership Group, and the Executive Search Group. Each division conducts workshops, provides consulting and coaching services, and assists school districts in maximizing their governance responsibilities.

Listed below are a few of the services provided by each division:

### **The Achievement Group**

- Curriculum and Instruction Workshops
- Instructional Coaching
- Research and Evaluation
- Assessment Support
- Measurement & Accountability Support
- Technical Assistance
- Troubleshooting

### **The Leadership Group**

- Speaking (keynotes, presentations, etc.)
- Board/Superintendent Relationships Coaching
- Assist the District's Governance Team in Building and Maintaining Positive Board/Superintendent Relations
- Team Building
- Strategic Planning
- Coaching New Superintendents
- Assist Boards and Superintendents in Creating and Maintaining a Superintendent Evaluation System Linked to District Strategic Goals

### **The Executive Search Services Group**

- Conduct Executive Searches
- Assist in Finding Interim Superintendents
- Consult with Boards on Resolving Conflicts Prior to the Superintendent Search
- Meet with Boards to Discuss the Executive Search Process and Review Options Available to Governing Bodies in Selecting a New CEO
- Conduct Transition Workshop when New Superintendent is Selected

At your convenience we would be happy to discuss in greater detail these additional services and price structures.

### ***We guarantee our work . . .***

We guarantee our service to your satisfaction or we will conduct the search again (*within the first year of the superintendent's contract if the Board members remain unchanged and providing the Board selected one of the candidates the DLA ESS advisers found to be professionally qualified and recommended to the Board*) for expenses only. Also, if the initial candidate pool is unsatisfactory to the Board, we will continue the search for expenses only.

## TYPICAL ACTIVITIES ASSOCIATED WITH THE SEARCH

THESE ACTIVITIES ARE PERFORMED IN A TYPICAL SEARCH. THIS GENERALLY TAKES BETWEEN FOUR AND FIVE MONTHS HOWEVER, DAVE LONG & ASSOCIATES EXECUTIVE SEARCH SERVICES WILL MODIFY THESE ACTIVITIES AND CORRESPONDING TIMELINE TO MEET BOARD DESIRES AND DISTRICT NEEDS.

1. Planning Meeting to determine scope and timeline.  
*Board is given binders with information to be used throughout the search.*
2. Community/staff input.
3. Adviser drafts brochure and board approves. Adviser begins to assist board in developing interview questions.
4. Applications close.
5. Paper screening. Screening committee evaluates applicant materials against the position profile.
6. Screening committee performs employment and reference checks on best-qualified applicants and recommends individuals for board interview.
7. Board receives screening committee report and determines candidates for first round interviews. Board is given copies of each candidate's application, and the complete files are available for the board to review. Adviser assists the Board to complete the development of questions for first round interviews.
8. Candidates are notified and interviews scheduled. Interview questions and copies of candidates' materials are copied for interview packets.
9. Interviews by Board.
10. Board determines candidates for second round interviews. Adviser assists with refining questions for the second round interviews.
11. Board conducts second round interviews. Adviser begins to notify unsuccessful candidates.
12. Board makes tentative selection of its prospective superintendent. Adviser requests federal criminal and related background check on finalist to be offered the position.
13. Board visits community of Board's selected finalist. Facilitated by adviser. Adviser does not accompany board on visitation.
14. Board selects new superintendent.
15. Board takes action to hire superintendent and introduce to community.
16. Dave Long & Associates Executive Search Services schedules a three-hour work session with board and new superintendent to help forge an effective working relationship. **(No additional charge)**

## **RECOMMENDED ACTIVITIES FOR THE FALL RIVER JOINT UNIFIED SCHOOL DISTRICT SEARCH**

The steps outlined above incorporate our recommendations to the Fall River Joint Unified School District as to how we believe the search should be conducted. We believe the search should be conducted throughout California in order to secure the largest possible field of candidates that meet the Board's adopted leadership profile.

We also recommend that the selection process be closed in that stakeholder involvement would be held to providing input on the qualities, traits, experience, and training of the ideal candidate. Under this approach there would be no separate interview panels composed of stakeholders to meet with applicants. All activities after the community, staff, and other interest groups in the district have provided input as to a leadership profile would be accomplished by the Governing Board and advisers in a closed setting as permitted by the Brown Act.

Over the years we have found that this approach affords the greatest confidentiality for candidates and ultimately yields the best field of applicants. Some candidates, particularly seated superintendents, will not make application to a district using interview panels composed in part or entirely of stakeholders. It is also well-established that the hiring of the superintendent is the sole responsibility of the Governing Board composed of trustees elected by the public. As such their responsibilities cannot be delegated to other individuals or groups.

We also recognize that local conditions may require a more "hands on" degree of involvement by stakeholders. We would be pleased to discuss these variations and their possible ramifications with you. Depending on the type of stakeholder involvement required above and beyond that suggested in this proposal, the amount of consultant time involved to assist additional participants in the search process could be increased. In that case there might be a modest increase in the fees quoted in this proposal.



**Dave Long & Associates Executive Search Services**  
**Searches Completed in Last Five Years by Our Advisers**

<u>District ADA</u>	<u>Name of District</u>	<u>District ADA</u>	<u>Name of District</u>
470	Big Oak Flat-Groveland USD	24,000	Grossmont Union HSD
10,500	Natomas USD	1,380	Mother Lode Union SD
310	Hughes-Elizabeth Lakes Union ESD	1,008	Pixley Union SD
19,000	Val Verde USD	2,529	Reef-Sunset USD
6,000	Lawndale ESD	9,000	Calexico USD
3,600	Gateway USD	984	Hope ESD
2,072	Old Adobe Union ESD	7,400	San Jacinto USD
126	Alexander Valley SD	23,000	Palm Springs USD
1,500	Mark West Union SD	534	Colfax ESD
640	Curtis Creek ESD	4,410	Placerville Union ESD
9,045	Pittsburg USD	5,144	Benicia USD
18,082	Pajaro Valley USD	6,000	Ukiah USD
1,730	John Swett USD	577	Grant ESD
16,700	Paramount USD	900	Esparto USD
7,137	Perris Union HSD	2,500	Healdsburg USD
4,056	South Whittier SD	42,000	San Juan USD
2,900	Coronado USD	2,500	Anderson Union HSD
1,500	Mountain Empire USD	12,500	New Haven USD
		17,915	Murrieta Valley USD

Note: Contact information available on request

## **AGREEMENT FOR ASSISTANCE IN SELECTING A SUPERINTENDENT**

This agreement is entered into by the Fall River Joint Unified School District (hereafter District) and Dave Long & Associates Executive Search Services (hereafter DLA).

### **DLA AGREES**

1. To meet with the governing board of the Fall River Joint Unified School District (hereafter Board) as required to assist and advise it throughout the search.
2. To meet with individuals and groups, including board members, employees, community members, and others who express an interest in the selection process. In the interest of an orderly and timely process, DLA may, in its discretion and after consulting with the Board, limit the number and time of such meetings.
3. To develop for Board approval and electronically distribute a recruiting brochure announcing the position.
4. To recruit candidates that DLA believes are qualified for the position.
5. To answer inquiries from interested persons concerning the position.
6. To collect and process applications and communicate with persons applying for the position.
7. To recommend qualified people to aid in the recruitment and selection process as necessary.
8. To conduct employment and reference checks on candidates recommended to the Board for interviews.
9. To assist the Board in preparing for candidate interviews.
10. To notify all unsuccessful candidates and thank them for applying.
11. To request a criminal and related background check on the finalist selected by the Board as its prospective superintendent.
12. To facilitate a Board visit to the community of the board's selected individual.
13. To hold the district harmless, indemnify and defend the district from any and all liability arising from the search and recruitment activity referred to herein, unless such liability resulted from negligence or malfeasance by the district or Board. The Board agrees to notify DLA within a reasonable time of receipt of any claim.

## **DISTRICT AGREES**

1. To have all board members present at all meetings regarding the selection.
2. To have at least one or two members of the Board visit the community of the prospective superintendent to obtain satisfactory assurance of the individual's acceptability.
3. To pay any and all expenses incurred by the district board members in connection with the superintendent selection process.
4. To pay the travel expenses of second round candidates to be interviewed.
5. To make appropriate facilities available for conducting interviews and other business related to the search in progress.
6. To complete the final employment process.
7. To have legal counsel develop or review any agreement between the Board and the prospective superintendent.
8. To hold DLA and advisers/professional screeners it may use harmless, indemnify and defend DLA, its advisers/professional screeners from any and all liability arising from the search and recruitment activity referred to herein unless such liability resulted from negligence or malfeasance by DLA. DLA agrees to notify the district or Board within a reasonable time of the receipt of any claim.

## **MISCELLANEOUS**

1. This agreement may be terminated at any time by either party by giving written notice to the other. At such time, the district shall be invoiced by DLA for services and expenses incurred for work accomplished to date.

**CONSIDERATION**

1. In consideration for the above services, the district agrees to pay DLA an all inclusive fee of **\$13,600**.
2. One-half of the fee, **\$6,800**, is due and payable upon execution of this agreement by both parties. The remainder of the fee is due and payable upon receipt of an invoice at the conclusion of the search.
3. DLA guarantees its services to District's satisfaction or DLA will conduct the search again (*within the first year of the superintendent's contract if the board members remain unchanged and providing the board selected one of the candidates the DLA professional screeners found to be professionally qualified and recommended to the board*) for expenses only. In the event the initial field of candidates is not satisfactory to the Board, DLA will continue the search process for expenses only.

For purposes of communication between the parties, the following shall be deemed to be representative of the parties:

**FALL RIVER JOINT UNIFIED  
SCHOOL DISTRICT**

**DAVE LONG &  
ASSOCIATES**

TERI VIGIL  
Board President

DAVE LONG  
President  
Executive Search Services

Fall River Joint Unified School District  
20375 Tamarack Ave.  
Burney, CA 96013

Dave Long & Associates  
Executive Search Services  
636 Loretta Drive  
Laguna Beach, CA 92651

Phone: (530) 336-5902

Phone: (916) 616-6027

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

# **BIOGRAPHICAL INFORMATION**

## **DAVID LONG, Ph.D.**

Dr. David Long was appointed by Governor Arnold Schwarzenegger as the Secretary of Education in March 2007. In that role, he served as policy advisor to the Governor on education issues. Dr. Long has more than 40 years of experience in the field of education, ranging from 21 years of classroom teaching to the superintendency. He obtained his Ph.D. from Iowa State University. Prior to his appointment by the Governor, Dr. Long was the Riverside County Superintendent of Schools.

In 2008 after leaving the Secretary of Education position, he formed Dave Long & Associates. This is a full-service educational leadership organization that assists school districts in improving student performance, effectively using data for informed decision-making, building effective governance teams and conducting superintendent searches.

Dr. Long is the immediate past President of the California County Superintendents Educational Services Association (CCSESA). He was named Chairperson of the Federal Education Safe and Drug Free Schools and Community Advisory Committee by former Secretary of Education Margaret Spellings. He has been honored as California Administrator of the Year by the National Organization of Partners in Education, Superintendent of the Year, and received the Governor's Award for school leadership. He was also honored as the Inland Empire Entrepreneur of the Year for his innovative approach to raising student achievement through the Riverside County Achievement Teams.

He has also received the prestigious Marcus Foster Memorial Award from the Association of California School Administrators for outstanding leadership and significant contributions to public education by a school administrator.

Dr. Long is deeply involved in communities. He is one of the First 5 Riverside commissioners, earned the Lifetime Achievement Award from 23rd District PTA, and Lifelong Learning Award from the Boy Scouts of America.

Dave and his wife, Joanne, a principal in the Corona-Norco Unified School District, have two daughters, Angelica and Vika. In addition, Dr. Long has four adult children and 12 grandchildren.

## **BARRY E. REED**

Barry E. Reed has a strong background in educational and administrative leadership. He was a superintendent from 1984-2003. Following his retirement as Superintendent of the Pacheco Union Elementary School District, jointly with Cascade Union Elementary School District, he joined the California School Boards Association Executive Search Services as a consultant. His searches include New Haven Unified (12,000), San Juan (42,000), Healdsburg Unified (2,000), Anderson Union High School District (2,000), Trinity Unified (2,000), Grant Elementary (500), Dublin Unified (4,000), Benicia Unified School District (5,000), Palm Springs Unified School District (25,000), Ukiah Unified School District (4,000), Colfax Elementary School District (500), Esparto Unified (2,000), and Placerville Union Elementary School District (1,800).

Reed was a lead writer and presenter for CSBA Masters in Governance from its inception (1998). He has presented the Human Resources, Policy and Judicial Review and Collective Bargaining modules throughout the state for the past ten years.

Reed was a successful superintendent for 18 years. He was active at a statewide level with the Association of California School Administrators and served on the ACSA state board. During the 1994-95 school year he was elected as the State President of ACSA. Reed also has been a classroom teacher, site principal, and a superintendent/principal.

Reed has been involved with executive searches for approximately four years conducting searches for districts as large as 42,000 students and as small as 500. He also was director of the Sacramento Superintendents Academy which helped train approximately 50 future superintendents.

January 12, 2011

Fall River Joint Unified School District  
Teri Vigil, Board President  
20375 Tamarack Avenue  
Burney, CA 96013

Dear President Vigil:

I am writing to offer the services of the Shasta County Office of Education Human Resource Services Department with your upcoming Superintendent recruitment and selection process.

Our office has assisted several districts in Shasta County with this process, and is pleased to offer them to your Board as well. We will handle all the logistics of your recruitment and selection process from developing a brochure for advertising purposes to reference checking on your final candidate. The Board, along with a committee comprised of district staff, parents and interested community members will be involved through the entire process.

I have attached a rough estimate of the costs associated with this recruitment. In addition, the district will be billed for actual costs of advertising, printing, and mileage.

If you have any questions regarding this proposal, please don't hesitate to contact me at 225-0280.

Sincerely,

BRENDA PALMER  
Human Resources Director

Attachment (1)

**FALL RIVER JOINT UNIFIED SCHOOL DISTRICT  
SUPERINTENDENT  
RECRUITMENT/SELECTION PROCESS  
Proposed Process**

**Support Services provided by the Shasta County Office of Education:**

Step 1	Meet with Board (or subcommittee of Board) to determine procedures, committees and timelines	1.5 hours
Step 2	Facilitate development of brochure, screening criteria, interview questions w/designated committee	2 hours
Step 3	Typeset brochure, application materials, place advertisements	2 hours (plus actual costs)
	Handling of Resumes/Applications	8 hours
Step 4	Facilitate Paperscreening w/committee	4 hours (plus copy costs)
	Board Report – Develop interview questions for final interview w/Board	2 hours
	Schedule interviews, prepare interview packets	4 hours (plus copy costs)
Step 5	Facilitate Initial Interviews w/Committee	8 hours
Step 6	Schedule Final interviews	8 hours
Step 7	Facilitate Final Interviews w/Board	4 hours
Step 8	Reference Checking	4 hours
Step 9	Report to Board on Findings of Final Candidate	1 hour
Step 10	Schedule/Facilitate Site Visits if needed	(to be determined)

Approximately \$2,000.00 plus actual costs advertising, printing and mileage.