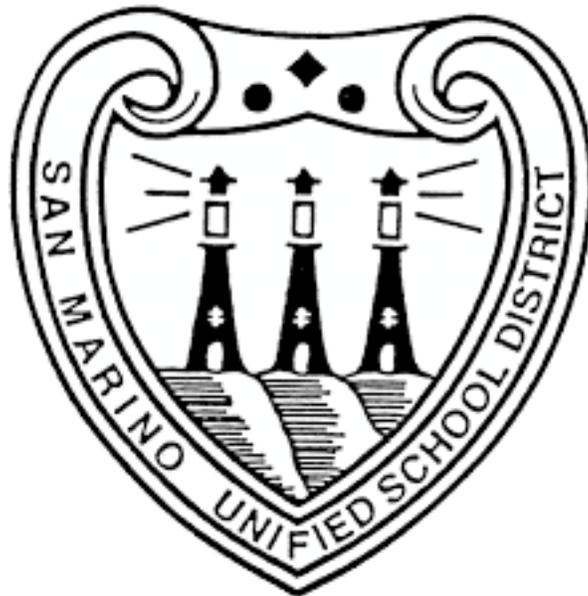


# Proposal

## Executive Search Firm Services for Superintendent of Schools



**January 27, 2019**

**JGCONSULTING**  
**WITH**  
**ESCALANTE & ASSOCIATES**

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**JGCONSULTING**  
WITH  
**ESCALANTE & ASSOCIATES**

**MEMORANDUM**

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Dear San Marino Unified School District Board of Education:

JG Consulting along with Escalante & Associates welcomes the opportunity to serve the San Marino Unified School District (San Marino USD) as the firm to manage the executive search process for the purpose of identifying a *Superintendent of Schools*. Our firms will manage the recruitment process in collaboration with the Board of Education. Our mission is to provide an equitable process while maintaining the district's standard of quality. We aim to accomplish this objective in a timely and cost-efficient manner with a benchmark of professional achievement and integrity. The consultants represent the school district and not the individuals seeking the position of Superintendent of Schools.

Our team works with school districts to find Superintendents, CEO's, Directors, executive-level administrators, regional-level administrators, principals and teachers. We are committed to the long-term success of our district partners. Our commitment begins with successfully matching candidates and school districts upon the completion of the position profile. We acknowledge the importance of supporting the executive search needs to ensure a strong intersection of talent.

Our recruitment efforts will span the country among various educational entities. The business methodologies implemented during the recruitment process will equip the district with access to every facet of our country's education landscape to achieve the district's objective of successfully identifying a Superintendent of Schools. We will be a dedicated partner of the district and will make every effort to communicate accordingly with everyone involved in the *Superintendent Search* process.

Our team's expertise is perfectly aligned to serve San Marino USD during the executive search process. We understand the ultimate goal is to improve the academic achievement of every student, and we welcome the opportunity to partner with the district to achieve this goal. Lastly, our team will guarantee a successful search for a Superintendent of Schools. We will conduct the Superintendent search again in its entirety at no cost to San Marino USD if the hired candidate serves the district less than two years.

Respectfully,

*James Guerra*

James Guerra  
President & CEO

JG Consulting dba  
P: (888) 765-3731  
O: (210) 901-5135  
C: (512) 676-3562  
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*Michael Escalante, ED.D.*

Senior Search Officer

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C: (818) 802-4769  
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# JGCONSULTING WITH ESCALANTE & ASSOCIATES

## INTRODUCTION & BACKGROUND

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JG Consulting has specific attributes unique to the firm:

**JG Consulting focuses on human capital.**

Our firm has diverse and rich relationships within the education landscape including the districts we support. We strive to develop new relationships with each new partnership.

JG Consulting promises ongoing communication with the Board of Education and candidates to ensure a seamless recruitment process.

**JG Consulting works *nationwide*.**

Our success has strengthened our relationships with many administrators across the country and we have vast access to a great talent pool that has made professional commitments to working in various markets.

The superintendent search will be managed onsite and remotely during each phase of the process. JG Consulting has Faculty members across the country whom are readily accessible to support the Board.

**JG Consulting has integrated a unique technology platform for recruitment efficiency.**

Our firm is connected to rising talent in districts across the country and we need to effectively connect with everyone in real-time.

We have integrated a unique technology platform, "Montage Talent, Inc.," unlike any other firm in the country that will allow San Marino USD to review candidate interviews and profiles on-demand. This tool enables us to efficiently recruit candidates while saving the district additional costs.

**JG Consulting accessibility and team members.**

Our team is accessible anytime during each phase of the executive search process.

James Guerra will serve as the Principal Consultant through the Superintendent Search process. He is the President & CEO of JG Consulting (a One-Fourth Consulting, LLC company). James has worked in the education space since 2003 serving the nation's largest school systems in various capacities.

Dr. Michael Escalante will serve San Marino USD as the Senior Search Consultant. Dr. Escalante was most recently the Superintendent of the Glendale Unified School District and the Fullerton Joint High School District over the course of 12-years before retiring. He currently serves as a Professor of Clinical Education at the University of Southern California Rossier School of Education. He has done approximately 40 searches over the past 9-years.

**JG Consulting is committed to working in any district seeking to recruit talented educators.**

We pride ourselves in supporting specific districts with intentional focus. We do not aim to support every superintendent search opportunity because we want to build long-term relationships with districts committed to seeking the most qualified candidates for their school system.

# JGCONSULTING

WITH

## ESCALANTE & ASSOCIATES

### SUPERINTENDENT EXECUTIVE SEARCH: WORK PLAN

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#### 1. Planning Discussion & Board Interviews

- 1:1 interviews with the Board Members;
- Stakeholder and community-related meetings;
- Define the scope of work for the search;
- Review and provide input on the job description, qualifications, competencies, selection criteria, legal requirements, newspaper and educational publications, announcements, search calendar and compensation package;
- Discuss any issues and expectations for the position;
- Determine the search and selection procedures including the search calendar;
- Discuss the recruitment of candidates;
- Discuss the screening process and preliminary evaluation;
- Discuss the interviewing process;
- Discuss the selection and hiring activities.

#### 2. Communication Protocols

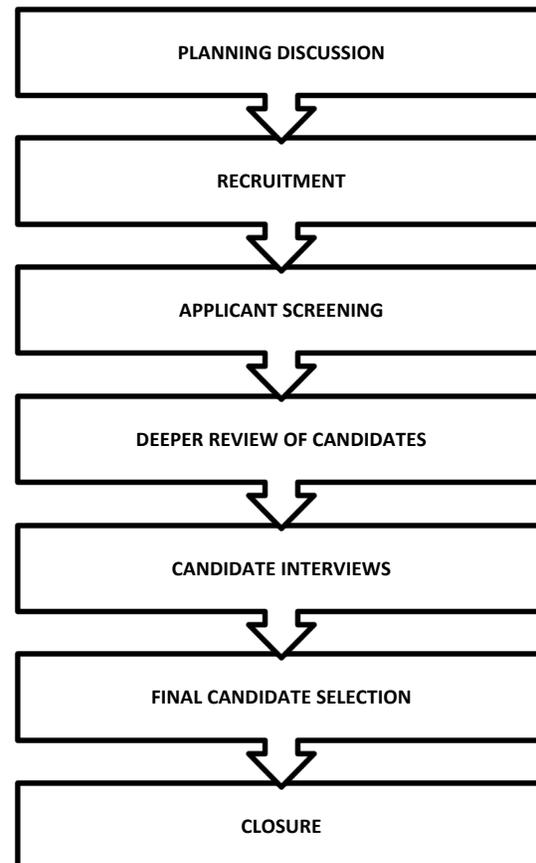
- We will assist with marketing, advertising and communication for the available position. These efforts will include advertising in educational publications, various websites with state organizations, national organizations and higher education institutions. We will develop an advertising plan for the Board's approval.

#### 3. Candidate Recruiting

- We will create a search strategy according to the unique needs of the district. We will not rely solely on advertising and job postings. Our firm will proactively engage with candidates across the vast educational ecosystem including national and state affiliations, private sectors and non-profit sectors;
- JG Consulting will distribute countless e-mails with the position profile and make countless phone calls to potential candidates and sources;
- We ensure a balance of gender and ethnicities among the qualified candidates we present to the Board. We will actively recruit traditional and non-traditional candidates that have successfully demonstrated leadership capacity;
- Our national networks will provide access to the for-profit, not-for-profit and other education communities nationwide. We utilize these channels in every search. Our network includes individuals within national and state education boards, political leaders and business leaders.

#### 4. Candidate Reviews

- We will review all communication from interested candidates seeking information on the position to determine if they meet the minimum qualifications;
- Candidates who meet the minimum requirements will be asked to furnish additional information that will enable us to further evaluate their skills and experience according to the position profile;
- The Board will have access to each candidate's profile throughout the duration of the executive search.



# JGCONSULTING WITH ESCALANTE & ASSOCIATES

## 5. Applicant Screening

- Candidates that successfully pass the pre-screening process will be presented to the district for discussion and determination for the first phase of interviews. *We do not work with a “stable” of candidates;*
- Additionally, JG Consulting will conduct thorough background checks of each candidate with a third-party;
- JG Consulting is a registered agent with E-Verify;
- *JG Consulting does not discriminate against any employee or job candidate because of his race, color, religion, national origin, sex (including pregnancy), physical or mental disability, or age.*

## 6. Candidate Interviews

- JG Consulting will provide comprehensive profiles of each candidate selected for an interview;
- Profiles will include: a synopsis completed by the firm, access to the Montage Talent, Inc. interview portal for each candidate, responses to preliminary screening questions, detailed responses from the personal interview rubric, a comprehensive background check by a third-party, completed reference checks, sample interview questions and original resume. We work with each group to ensure that the candidates have been vetted.

## 7. Deliberation in the selection process of candidates for final consideration.

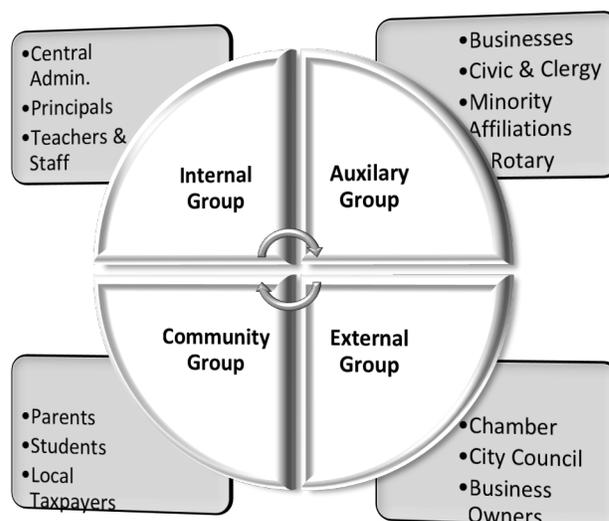
- Arrange for Board of Education candidate district visits (quantity and locations to be determined by the Board); if applicable.

## 8. We will support the district when requested on final interviewing protocols.

## 9. Closure

- We will contact all candidates as a process of the closing phase of the executive search. JG Consulting will also prepare final reports and assist in the announcement of the appointment, if requested by the Board. We will serve as an intermediary to construct the Superintendent’s contract, if requested by the Board.

## Example Stakeholder Meetings<sup>1</sup>



<sup>1</sup> Stakeholder recommendations will be made by the Board of Education. We will also post an online survey accessible on the San Marino USD website to protect the anonymity of the public and staff.

# JGCONSULTING

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## ESCALANTE & ASSOCIATES

### SUPERINTENDENT EXECUTIVE SEARCH: SAMPLE TIMELINE

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| Proposed Activities  | Proposed Timelines <sup>2</sup> |
|--|---------------------------------|
| 1. Planning discussion to initiate search  | January                         |
| 2. Prepare materials, research recruiting channels within K-12 and external networks; define marketing and recruiting strategies; conduct community-related meetings as identified by the district   | January – February              |
| 3. Marketing and Recruiting Activities: <ul style="list-style-type: none"><li>• Local, state, regional and national publications;</li><li>• Other education publications and websites;</li><li>• Campaigns: E-mails, calls, and in-person recruitment at national conferences;</li><li>• <i>ACSA Conference (January 29 – February 1)</i>: annual California conference for school administrators;</li><li>• <i>AASA Conference (February 14-16)</i>: annual conference for school administrators.</li></ul> | January – February              |
| 4. JG Consulting candidate screening; includes online interviews   | February – March                |
| 5. Application due date  | Mid-March                       |
| 6. Prepare and present pre-screened applicants in a reporting format and with access to the interview videos   | Late March                      |
| 7. District interviews; may require multiple scenarios   | Early April                     |
| 8. Select a candidate for hire   | April                           |

**\*Timeline is customizable to the needs of the School Board.**

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<sup>2</sup> All dates will be aligned to meet the deliverables of the Board of Education.

# JGCONSULTING WITH ESCALANTE & ASSOCIATES

## EXPERIENCE: CONSULTANTS

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JG Consulting experience.

### Consulting Team Information:

**James Guerra**  
**Principal Consultant**

Corporate Office:  
2025 Guadalupe St., Ste. 260  
Austin, TX 78705  
P: (888) 765-3731  
C: (214) 934-5537  
F: (512) 376-3501  
E: [james@jgconsulting.us](mailto:james@jgconsulting.us)

**Dr. Michael Escalante**  
**Senior Search Officer**

[escalanteandassociates@gmail.com](mailto:escalanteandassociates@gmail.com)  
C: (818) 802-4769

[JG Consulting](#) has successfully managed more than 60 executive searches nationwide in the past 4-years. We have dedicated Faculty strategically located in the nation's largest markets. JG Consulting is the only full-service firm supporting school districts nationwide. We are also the only firm to host an annual Leadership Academy to support the career development for aspiring leaders and superintendents. The next [Leadership Academy](#) will begin in March to coach aspiring superintendents (25 cohort members) representing various districts across the country.

[Faculty](#)

[Testimonials](#)

[Editorials](#)

Please refer to individual credentials and other acknowledgements of the designated consultants associated with the Superintendent Search Firm Services (following pages).

Corporate Office:  
2025 Guadalupe St., Ste. 260  
Austin, TX 78705

Regional Office:  
201 N. Brand Blvd., Ste. 200  
Glendale, CA 91203

Regional Office:  
13775 S. Ramona Ave.  
Hawthorne, CA 90250

# JGCONSULTING

WITH

## ESCALANTE & ASSOCIATES

### REFERENCES: CALIFORNIA & TEXAS SCHOOL DISTRICTS

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**Lynwood Unified School District**  
**Dr. Gluidel Crosthwaite, Superintendent**  
Lynwood, CA 90262  
P: (626) 233-0564  
**Chief Business Official Search**  
***Placed: Dr. Gregory Fromm***

**Crosby Independent School District**  
**Carla Windfont, Board President**  
Crosby, TX 77532  
P: (281) 883-7083  
**Superintendent Search: 6,200 Students**  
***Placed: Dr. Scott Davis***

**San Diego Office of Education**  
**Dr. Paul Gothhold, Superintendent**  
6401 Linda Vista Road  
San Diego, CA 92111  
P: (323) 440-7568  
E: [paul.gothhold@sdcoe.net](mailto:paul.gothhold@sdcoe.net)  
**Assistant Superintendent Search**  
***Placed: Michael Simonson***

**Goethe International Charter School**  
**Lucio Chaidez, Board President**  
12500 Braddock Avenue  
Los Angeles, CA 90066  
P: (310) 650-3461  
E: [lucio.e.chaidez@wellsfargo.com](mailto:lucio.e.chaidez@wellsfargo.com)  
**Executive Director Search**  
***Placed: TBD***

**Hutto Independent School District**  
**Connie Gooding, Board President**  
200 College Street  
Hutto, TX 78634  
P: (512) 517-4320  
E: [connie.gooding@huttoisd.net](mailto:connie.gooding@huttoisd.net)  
**Superintendent Search: 7,000 Students**  
***Placed: Dr. Celina Estrada Thomas***

**Victoria Independent School District**  
**Ross Mansker, Board President**  
102 Profit Drive  
Victoria, TX 77901  
P: (361) 935-6149  
E: [rmansker@suddenlink.net](mailto:rmansker@suddenlink.net)  
**Superintendent Search: 14,300 Students**  
***Placed: Dr. Quintin Shepherd***

**DeSoto Independent School District**  
**Carl Sherman, Board President**  
P: (972) 595-4510  
E: [carl.sherman@desotoisd.org](mailto:carl.sherman@desotoisd.org)  
**Superintendent Search: 9,700 Students**  
***Placed: Dr. D'Andre Weaver***

**South San Antonio Independent School District**  
**Angelina Osteguín Board President**  
P: (210) 835-6709  
E: [aosteguín@southsanisd.net](mailto:aosteguín@southsanisd.net)  
**Superintendent Search: 9,100 Students**  
***Placed: Dr. Alexandro Flores***

# JGCONSULTING

WITH

## ESCALANTE & ASSOCIATES

### SUPERINTENDENT EXECUTIVE SEARCH: COST

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#### Analysis

The Superintendent Search will begin immediately upon award. JG Consulting will correlate to the timeline goals set forth by San Marino Unified School District.

The firm will work diligently onsite in the district with the Board of Education and community stakeholders as often as requested. The team of consultants will also engage in various remote activities to ensure maximum productivity.

There are no additional publishing and advertising fees associated with the Superintendent Search. The firm will incur any and all costs. We rely on various outlets but primarily engage with our California and national network and affiliates.

**JG Consulting will also incur the cost of the on-demand interview subscription, Montage Talent, Inc.**

Payment terms are \$6,250 upon execution of the contract. The final payment of \$6,250 will be due upon the hiring of a candidate. Payment is due net 30-days for each installment.

**Total Cost for All Services Rendered = \$12,500 (All-Inclusive & Not to Exceed).**

Bid Contact Person:

**James Guerra**

**President & CEO**

Corporate Office:

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Austin, TX 78705

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C: (214) 934-5537

F: (512) 376-3501

E: [james@jgconsulting.us](mailto:james@jgconsulting.us)

# JGCONSULTING

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## ESCALANTE & ASSOCIATES

### ADDITIONAL SERVICES: PROFESSIONAL DEVELOPMENT

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The JG Consulting team and faculty can serve as a resource for the newly hired Superintendent with onboarding and transition planning, if applicable. San Marino Unified School District may engage with JG Consulting to provide 1:1 or small group coaching with various levels of district leadership. The service is available in-person and/or online. The Board of Education, Superintendent, executive-leadership team and site-based staff will have an opportunity to engage with our Faculty when needed.

Our distinguished Faculty may support the Board of Trustees and District Leadership with professional development opportunities. The design of the training workshops is dependent on the goals and needs of the district. The JG Consulting team will customize a plan of action according to the unique goals and needs of the School Board and District Leadership with ongoing support consisting of onsite work sessions and regular communication. Our goal is to serve the district as a resource to promote continuous improvement for San Marino Unified School District starting with the Board of Education and District Leaders.

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### 90-Day Advertising Plan<sup>3</sup>

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| Description  | Details                                     | Total Estimate <sup>4</sup> |
|--|---|-----------------------------|
| Escalante & Associates Website<br>CA Association of School Admin. (ACSA) | <i>Countless Views</i><br><i>2 Editions</i> | Included<br>\$450           |
| LinkedIn   | <i>60-Day listing</i>                       | Included                    |
| American Association of School Admin. (AASA)                             | <i>Length of Search</i>                     | \$350                       |
| JG Consulting Website, Twitter (2) & Facebook                            | <i>Countless Views</i>                      | Included                    |
| CA Alliance of Black School Educators (CABSE)                            | <i>Length of Search</i>                     | Included                    |
| National Alliance of Black School Educators (NABSE)                      | <i>Length of Search</i>                     | Included                    |

**The costs associated in Advertising Plan will be incurred by JG Consulting. No advertising fees will be charged to San Marino USD.**

<sup>3</sup> Advertising plan will correlate to our proposed timeline (page 7 of the JG Consulting proposal); we will customize the plan to meet the needs of the Board.

<sup>4</sup> The cost associated with each advertisement will be incurred by JG Consulting.

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**ATTACHMENTS & EXHIBITS: REQUIRED FORMS**

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Attachments:

- i. Consultant Resumes
- ii. Article, "Pathway to Superintendency"