

# Response to Request for Proposal Services for a Superintendent Search Partner

Presented to



Submitted by

**Ray & Associates**  
**RECRUITING. DEVELOPING. ENGAGING.**

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## A Message from our President...

January 28, 2023

Thank you for your interest in learning more about how Ray & Associates can assist you in the search for a Superintendent. We have been highly successful in providing Superintendent search services for Districts that are similar to yours in terms of size, cultural diversity and geographic location and would welcome the opportunity to do the same for you.

As I am sure you are aware, the selection of a Superintendent will be one of the most important activities your Board will perform. The Board's success in the search process will affect your school district's education program for years to come. As a national and proven search firm, we are uniquely qualified to develop and execute a talent acquisition strategy tailored to your district's needs. Our professional, objective procedures allow us to attract, process and screen the most successful candidates for your Superintendent position.

We are familiar with Charlotte-Mecklenburg Schools as we have worked with you in the past. In North Carolina as we are currently assisting Wayne County Public Schools and previously conducted Superintendent searches for Durham Public Schools and Guilford County Schools.

Our reputation for success is proven, long-standing, and built upon providing school districts precisely the type of candidate that satisfies not only the Board but the community and staff as well. If you have any further questions or comments regarding the enclosed information, please do not hesitate to contact our Cedar Rapids office at 319-393-3115.

Sincerely,



Michael Collins, President  
[michael@rayassoc.com](mailto:michael@rayassoc.com)

# Introduction

This Proposal is an example of the quality of our work for a state, regional and national search. **Our firm is committed to spending the time and energy on the details necessary to perform a proper search.** We actively seek out and screen all candidates who are recruited during the search to identify those who are superior and who meet or exceed the qualifications set by the Board.

This document is designed to demonstrate that we desire to provide you with a complete, detailed package customized to your District in a performance contract regarding our professional services for your Superintendent search.

Our Proposal consists of our *consultant services, general provisions, confidentiality, satisfaction guarantee and consultant cost.*



Throughout this Proposal, we will document our highly effective procedures to assist schools, step by step, in selecting a Superintendent whose qualifications meet its criteria.

We have been **highly successful in delivering outstanding candidates** in all of our searches.

# The Ray Way: Our Process

Ray & Associates' goal is to make the selection process professional, efficient, and successful to ensure your complete satisfaction with our services. Below you will find an overview followed by a walk-through of our process.



Read on to learn more details about each step in our process.

# Stage One: Discovery – Board Input and Preparation

During the first stage, our goal is to learn more about your specifications and unique district culture in an effort to target needs with precision.

The firm will meet with each Board member individually to obtain input for the profile development. We will also meet with the entire Board to determine details like setting the timeline for the search, finalize procedures and services desired by the Board, establish the Board contact person(s), discuss the application process, set the advertising, and determine the salary, among other details.

## Action Items during Stage 1:

- Customize the search process to meet the needs and expectations of the District.
- Conduct individual Board member interviews to assess the Board’s priorities, goals, and objectives to aid in the development of the criteria and qualifications for the Superintendent position.
- Work with the Board to establish a timeline that lists each step in the search process.
- Discuss with the Board the requirements and salary range for the Superintendent position.
- Work with the District staff and those selected by the Board in the development of an accurate informational flyer and online application form.
- If desired, create the district’s promotional brochure.

## Examples of district prepared recruitment brochures:

[LINK TO ROGERS PUBLIC SCHOOLS, AR SEARCH FLYER \(DISTRICT PREPARED\)](#)

**Calvert County Public Schools**

**Seeks a Superintendent of Schools**

1305 Dares Beach Road, Prince Frederick, Maryland  
Check us out at <http://www.calvertnet.k12.md.us>

**Our District**  
Located 35 miles southeast of Washington, D.C. and 55 miles south of Baltimore, Calvert County is a scenic peninsula bordered on the east by the Chesapeake Bay and on the west by the Patuxent River. The county—Maryland’s smallest at 213 square miles—is home to over 90,000 people. Calvert County Public Schools, the 13th largest by student population among 24 school systems in the state, consistently ranks among Maryland’s top districts based on state assessments. The school system’s high achievement, numerous options for career and technology programs, school climate, and support services for students attract many families to the area.

**Our Mission**  
The Calvert County Board of Education ensures excellence in education for our students through vigilant oversight, sound policies, and meaningful community engagement.

**Our Vision**  
Calvert County Public Schools seeks to produce graduates who are responsible citizens with career and educational choices in the 21st century.

**Beyond Academic Highlights**

**Equity Initiatives**  
The Office of Equity and School Improvement is dedicated to elevating access and opportunity for all. Each school, as well as the central office, has an equity team focused on helping staff to build the knowledge and skills necessary to address bias and inequities.

**School Libraries**  
Calvert County Public Schools is the recipient of the American Association of School Librarians’ (AASL) 2021 National School Library of the Year (NSLY) Award.

**Green Ribbon District Award**  
In 2019, CCPS was awarded a Green Ribbon District award by the U.S. Dept. of Education for our sustained efforts over the past decades to reduce our environmental impact and costs, promote better health and provide high quality environmental education. We are one of the few districts in Maryland to have had 100% of our schools certified as Maryland Green Schools.

**About Us**  
12 Elementary  
6 Middle  
4 High  
1 Career & Technology Academy  
1 Special Education Center  
Enrollment 15,292

**Calvert County Public Schools**

**Salary and Benefits**  
The salary will be in the range of \$215,000.00 to \$230,000.00 with an excellent benefit package. The final salary for the successful candidate will be determined based upon proven experience, qualifications, and meeting Board criteria.

**Requirements**  
The candidate must have or be qualified to obtain superintendent credentials as required by the State of Maryland. Questions about certification should be directed to the Maryland State Department of Education either by telephone at 410-767-0412 or through the MSDE Web site at <http://marylandpublicschools.org>.

**Deadline and Selection**  
All materials submitted by the deadline of January 17, 2022 as part of the Superintendent application will remain confidential to the fullest extent allowed by law, which includes board review in a closed session of the Board of Education. After all applications have been reviewed and preliminary interviews conducted by the consulting firm, the names of the top candidates will be presented to the Board of Education for its consideration. Selection of candidates for interviews is the sole responsibility of the Board. Persons wishing to be considered for the position should submit an application file online including:

- A letter of application stating personal qualifications, experiences, and reasons for interest in the position.
- The online application form and a resume.
- Four current letters of recommendation.

**Apply online at**  
[www.rvassoc.com](http://www.rvassoc.com)  
Questions should be directed to:  
Ray & Associates, Inc.  
P.O. Box 10045, Cedar Rapids, IA 52402  
Phone: 319-393-3115 Fax: 319-393-6911  
[molly@rvassoc.com](mailto:molly@rvassoc.com)  
Please do not contact the Board or District directly.

**Deadline to Apply: January 17, 2022**

# CHARLOTTE-MECKLENBURG SCHOOLS SUPERINTENDENT SEARCH **SUGGESTED** PROCESS AND TIMELINE

*Items highlighted in yellow indicate an in-person meeting with the consultant(s)*

**DATE**

Stage 1 Board Input & Preparation	<u>2/13/2023</u>	Consultant planning meeting with the Board and individual Board member interviews. <b>(Time: TBD) (option to conduct virtually)</b>
	<u>2/14/2023</u>	Begin preparing information for the District promotional flyer and online application form with the District liaison representative(s).
	<u>2/14/2023</u>	Notify all associates and other professional contacts of vacancy.
	<u>2/14/2023</u>	Contact constituents and stakeholders for input meetings on <u>if needed</u> .
Stage 2 Profile Development & Process	<u>If needed</u>	Online survey link, for input on developing the profile, available on District website from _____ to _____.
	<u>If needed</u>	<b>Meetings with constituent and stakeholder group representatives. (In person, virtual or both)</b>
	<u>If needed</u>	8 a.m. deadline for survey/input from constituents, stakeholders and Board members, including online survey.
	<u>2/20/2023</u>	Promotional flyer or video draft due.
	<u>2/23/2023</u>	Board to finalize Superintendent profile for the promotional flyer and online application form. <b>(Time: TBD) (option to conduct virtually)</b>
Stage 3 Recruiting & Screening	<u>2/27/2023</u>	Print promotional flyer. Forward to consultant.
	<u>2/27/2023</u>	E-mail promotional flyer and online application instructions to interested candidates.
	<u>3/17/2023</u>	Deadline for all application materials. <i>(*See note below.)</i>
Stage 4 Candidate Presentation	<u>3/20/2023</u>	Consultant develops and finalizes interview questions and procedures with the Board. Top candidates are presented to the Board and consultant assists the Board in selecting finalists for the interviews. If desired by the Board, consultant will meet with constituents and staff interview group(s) to discuss their roles. <b>(Time: TBD) (In person)</b>
	<u>3/27/2023</u>	Interview finalist candidates <b>(stakeholder involvement)</b>
	<u>3/27/2023</u>	<b>Meeting with consultant following the last interview. (Time: TBD) (option to conduct virtually)</b>
Stage 5 Selection of Finalist & Future Planning	<u>4/03/2023</u>	Meeting with consultant to select Superintendent <b>(option to conduct virtually)</b> .
	<u>4/10/2023</u>	Offer the contract.
	<u>4/25/2023</u>	Press release of new Superintendent.
	<u>TBD</u>	Board Self-Assessment Survey Results presented to the Board.

**\*All applications will be reviewed. Materials received after the closing date may be given full consideration depending upon the number of applications received and other factors. (Actual dates to be determined in the first meeting with the Board.)**



## Stage Two: Profile Development – if needed

Once we have collected information from the Board during the Discovery stage, the Profile Development process will begin.

Ray & Associates *firmly believes in parent, student, staff, and community participation in our process*, especially in the development of an accurate profile for the position. In this stage, we will engage with not only groups of constituents identified and selected by the Board, but the community at large as well. These opportunities help create an accurate profile of the Superintendent who would best fit your District's needs.

### How We Engage



#### Individual and Group Interviews

We are eager to interview each Board member individually as well as visit with designated stakeholder groups as identified by the Board. From Administrators to Support Staff, the designated group bring unique perspectives to help us develop a comprehensive profile for leadership.



#### Open Community Forums

In addition to interviews, we host community forums and invite all community members, staff and parents to participate. With forums in both the morning and evening, we maximize attendance of constituents. These forums help us solicit input via the survey process and create dialogue by asking a series of questions related to the desired characteristics of the new Superintendent.

The purpose of these meetings will be to educate stakeholders about the process as well as to gather and organize information that will contribute to the development of an accurate profile for the position.



#### 31 Desirable Characteristics Survey

In addition to scheduled meetings and forums, we offer an online profile survey option, our exclusive 31 Desirable Characteristics Survey. This survey has space for written comments and recommendations. The survey is available in various languages to be placed on the District website.

### Results of our dialogue

The results of the stakeholder input is summarized in a report **shared with the Board and community** regarding **our findings and recommendations**.

We will present a tabulated and analyzed graphic report in which Board members' and stakeholders' survey responses are reviewed looking for those characteristics chosen most in common by the various groups and indicate those recommended or those thought to be worthy of consideration.

Our dialogue with constituents and interviews with individual Board members, coupled with survey results and comments, provide our firm with an accurate profile that is employed in the recruiting and careful screening of applicants. The characteristics most commonly selected will be used later in promotional materials.

**"In a somewhat constricted timetable, Ray & Associates lead a process to gather information from all stakeholder groups on the characteristics that should be prioritized in the search, managed the application and interview process, and organized a busy day of in-person forums and zoom meetings for stakeholder groups."**

**- Ms. Victoria Powers  
Bexley City Schools Board VP**

## Stage Three: Recruitment and Screening

Using the newly created Profile as our guide, Ray & Associates will begin searching our extensive network of professionals to find the perfect match.

### Recruitment

**We believe the best candidates need to be recruited. Ray & Associates will conduct all aspects of the recruitment process on a statewide, regional and national basis as follows:**

- Contact individuals in our firm's database of nearly 3,000 school administrators whose interests match District criteria.
- Utilize our network to solicit nominations from groups including:
  - Our Associate Team from across the nation
  - Ray & Associates' National Advisory Committee
  - Contacts from various Professional education organizations
  - Other Professional Consultants in the private and public sectors

This network paired with our database and 28,000 unique monthly visits to our website allows us to recruit applications from qualified individuals.

### Advertising

**We're here to share your message by utilizing the robust Ray & Associates website paired with productive educational advertising venues and social media channels**

- Advertise nationally in the following external platforms as selected by the Board:
  - The School Superintendent's Association (AASA)
  - Education Week Newspaper and Website
  - National Association of School Superintendents (NASS)
  - State Administrators and State Association of School Boards Publications
  - The School Administrator Publication, Executives Only Website
  - Association of Latino Administrators and Superintendents (ALAS)
  - National Alliance of Black School Educators (NABSE)
  - American Association of School Personnel Administrators (AASPA)
- Advertise nationally in the following internal platforms:
  - Ray & Associates Website
  - Ray & Associates Candidate Database
  - Ray & Associates Social Media Channels
    - Facebook, Twitter, LinkedIn
  - Associate Networks and Word of Mouth

### Screening

**Once viable candidates have been identified, Ray & Associates contacts provided references as well those not listed on the applications. Our background research team then conducts extensive investigations of top candidates through our comprehensive system.**

These investigations go well beyond listed references and their current position to include contacts with state associations and national leadership organizations. A complete check of a candidate's work history is also completed utilizing online search engines as well as social media. We not only vet candidates extensively in their professional career, but it is also important for us to be familiar with their personal life as that can have an impact in their profession. The candidates who meet the qualifications selected by the Board become top candidates.

Finally, our firm interviews each viable candidate that meets Board criteria and verifies their qualifications and experience to ensure only the best matches are presented to the Board.

## Stage Four: Candidate Presentation

### Candidate Review

Ray & Associates aims to bring between *8-12 top candidates* before the Board for their consideration. Board members will have the opportunity to review the application packet submitted by **every** candidate as well as to watch one-way video interviews completed by the 8-12 top candidates.

### Consensus Building

Upon the completion of the candidate review, Board members will be asked to individually complete a matrix which allows them to compare each top candidate against one another. The R&A representative will then provide the Board with a summary of the individual Board responses. This summary assists the Board members in reaching consensus on which candidates advance to the interview stage.

### The Interviews

Ray & Associates will coordinate all logistics of the interview process with candidates, as well as assist the Board in establishing the interview format, developing interview questions, and evaluating post-interview.

**Ray & Associates will conduct criminal, civil litigation, sex offender registry, social security, motor vehicle record checks and verification of educational degrees on the top 2-3 candidate(s) through an outside service at no additional cost.**

## Stage Five: Candidate Selection

### First Round Interviews

We typically conduct First Round Interviews with 6-8 Candidates in a virtual format (in-person is also an option) in an effort to maximize cost savings for the District. Following all interviews, the same matrix from the candidate presentation will be conducted to narrow the candidate pool down to typically two to three finalists.

### Final Interviews

Final Interviews are conducted on-site at the District, in-person with the Finalists and District personnel. These interviews include a final interview with the Board as well as meetings with small constituent groups as identified by the Board. Additionally, forums with Administrators, Teachers and Support Staff, and the Community at large will be held. Candidate Impression Forms are provided to all participants asking for feedback without the ability to rank the candidates.

**Once a final candidate is selected, we work with you to lay the foundation for a winning offer. Our team will work with the District legal staff in negotiating the contract with the successful candidate at no additional cost to the District.**

## Stage Six: Future Planning

After your offer is accepted, we stay in touch with you and the candidate to support a smooth transition and a successful start with your District.



### Release of the New Candidate

Upon the selection of the Superintendent, Ray and Associates will work with the Marketing and Communications Team for the District to issue a press release regarding the process and selection of the new leadership.

We also send appropriate communications to the candidates not selected by the Board.



### Board and District Assessment

At the conclusion of the search, we will provide the Board with a link to an online survey concerning current District governance practices as well as key District challenges and opportunities for improvement. Assessment results are then analyzed and shared with the Board and the new Superintendent. The results can be emailed, presented in-person or via Zoom.



### 6 Month Follow-Up Assessment

About six months after the new Superintendent begins, we will provide the survey again to be completed by the current Board and the Superintendent. As in round one, at no cost to the District, the results will be analyzed and shared with the Board and Superintendent to assist with team building every year thereafter as long as that Superintendent is in tenure.

## History of the Firm

### Who We Are

Ray & Associates, Inc. is a professional organization that *specializes in school executive leadership searches*. **We have been in the school executive search business since 1975, establishing a strong history and reputation within the industry.** We are proud to be recognized by The School Administrator Journal as one of the top search firms in the country.

### What We Do

As a national search firm, we are uniquely equipped to assist in the selection of a Superintendent who meets the particular needs and qualifications of your district. Our team will guide your district through a step-by-step process to select your next Superintendent.

While many other search firms do not seek out candidates for a position, we believe outstanding candidates need to be recruited. With our extensive regional and national associate base and targeted advertising, Ray & Associates is able to engage quality candidates from around the country, as well as within the state. Our professional, objective procedures allow us to attract, process and screen the most successful candidates for a Superintendent position.

Ray & Associates is an independent and objective firm that does not accept placement fees from any candidate. Our procedure allows us to impartially assist schools in selecting the best individual for their particular needs. You will also find our system is flexible, which allows us to customize the search to meet the desires of the Board.

### How We Work

*What makes us stand out from the crowd?* **Our people.** Our professional consultants, located across the US, are individuals with diverse backgrounds and long-term experience in the educational executive search field. From backgrounds as school administrators, business executives, school board members, university professors and attorneys, our team brings a wide range of lived experiences and perspectives to the table.

In addition to our Associates, our corporate office in Cedar Rapids, Iowa *maintains a full-time and experienced administrative staff* to assist in the executive search business.



#### Our Why

As a company, our purpose is *connecting passionate, innovative and driven leaders within education to spaces where they can use their skills to amplify the voices and ideas of their students, colleagues and communities to create a lasting impact.*

## 1) Search Experience – 50,000 students or more

This is a partial list:

The School District of Lee County, FL – 95,000 students  
Broward County Public Schools, FL – 260,000 students  
Hillsborough County Public Schools, FL – 220,000 students  
Baltimore County Public Schools, MD – 113,000 students  
Seattle Public Schools, WA – 52,000 students  
Omaha Public Schools, NE – 52,900 students  
Clark County Public Schools, NV – 326,000 students

## 2) List of K-12 assignments – Superintendent searches

Below is a list of Superintendent searches conducted within the last year. **The average length of a search is 90 to 120 days depending on Board/district calendars and holidays. All of the searches below included stakeholder involvement at some point in the process.**

Bloomington Public Schools, IL  
Madison School District, AZ  
Balsz School District, AZ  
Bozeman Public Schools, MT  
Broward County Public Schools, FL  
Educational Service District 123, WA  
The School District of Lee County, FL  
Millard Public Schools, NE  
Clear Creek Amana CSD, IA  
Park Hill School District, MO  
Rogers Public Schools, AR  
Williston Basin School District #7, ND  
Anchorage School District, AK  
Northville Public Schools, MI  
Calvert County Public Schools, MD  
Stoughton Area School District, WI  
Pine City Public Schools, MN  
Berlin Area School District, WI  
Ferndale Public Schools, MI  
Cary School District 26, IL  
Geneva CUSD 304, IL

### 3) Identifying and Placing a Diverse and Qualified Pool of Candidates

Ray and Associates is a very diverse firm; 40% of our associates are women and/or minorities. We have developed the most comprehensive pool of candidates of any executive search firm in the country. Our firm has a national reputation for the recruitment of outstanding candidates that match the expectations of the Board and community. We are extremely successful in recruiting women, minorities and non-traditional/hybrid candidates for our clients. Our firm has placed more women and minorities in the country than any other firm. 49% of placements have been persons of color. 33% of placements have been women with 70% of the women placed being persons of color.

We aggressively recruit candidates outside our database because many candidates currently have a good job and are not seeking a new position. Because of associates we have around the country, we can recruit candidates who have the specific skills for your District and conduct a thorough investigative process and background checks on all viable candidates to ensure you are looking at quality school leaders in all aspects. We not only use our associates but utilize various state and national conventions. While a database is important, actively seeking and recruiting candidates specifically for the districts we serve is a strength of our firm. **The average number of states of origin for candidates being made aware of the position is between 45 and 50 for each search we conduct with completed applications being received from candidates in approximately 16 states, depending on the district location.** It will be our shared goal with the board to make the selection process inclusive, professional, efficient and successful so we can state without reservation you will be quite pleased with our services.

### Commitment to Diversity, Equity, and Inclusion

Ray & Associates will provide our clients with the highest quality services to assist them in hiring leaders who will meet District specific needs and positively impact the education of all students.

Ray & Associates is committed to the principles of Diversity, Equity, Inclusion, and Social Justice. During these challenging times we articulate our organizational commitment to identifying and acting upon the changes that are needed to bring about inclusion and recognize the need for equity.

We recognize social injustice, socio-economic limitations and the disparities associated with the identification and placement of school district leadership personnel. Therefore, we will:

- Declare inclusion as a core value and engage in intentional conversation and behavior around diversity and equity
- Place equity, inclusion, and diversity as major tenets of practice
- Identify diversity and inclusion as a model impacting our school search practices
- Focus on the delivery of our respective services through the lenses of integrity, equity, and inclusion.

As a broad-based representative, nationwide organization that focuses on the delivery of leadership search and selection services to school districts, we commit ourselves to the statements above.

We will continue to bring forward the organization's forces of institutional leadership, advocacy, scope of representation, levels of expertise and spheres of influence in these areas from now and in the future. Join us as we **WORK together, ASK questions, LISTEN fully, and ACT meaningfully!**

## 4) Conflicts of Interest/Off-Limits Policy

- a. While we do not recruit candidates we have placed for a minimum of 5 years, we cannot control who applies for positions. This policy has not affected our recruitment of candidates. A majority of placed candidates do not come from our database, but rather, outside of it.
- b. We have never had any type of financial arrangement with a candidate included in any of our searches.

## 5) Current Legal Claims

No legal claims were filed or pending in the last 5 years.

## 6) Candidate Confidentiality

We maintain candidate confidentiality in the process as long as possible, depending on state law, with candidate names typically being announced once they become a finalist. The nature of our work and our ability to carry out our responsibility to you is directly related and dependent upon our present and past experience in providing similar services to others. Ray & Associates will preserve the confidential nature of any information which becomes available to us resulting from the services rendered to the Board.



## Key Associates

The following principal/project coordinators will be actively involved in working with the school district. The associates listed below will be assisting in recruitment, screening, and background checks. The firm chooses various associates across the country to be sure that every region will be covered to recruit the best candidates for Charlotte-Mecklenburg Schools. In addition, we have professional contacts throughout North Carolina, the southern region and nationally. The following is only a partial list of associates who will be involved in the recruitment and screening of candidates.

### **Mr. Michael Collins, President, Columbus, OH**

Mike is President of Ray & Associates. He oversees all searches conducted by the firm and will directly interact with your District and any committee that may be established on all details of this search. He has a bachelor's degree in Secondary Education from Miami University and a master's degree in Education from Ball State University. Mike has been a business owner for 37 years including a statewide education consulting firm. He is also a former two term city school district Board of Education member and a former two term elected State Board of Education member.

### **Ms. Kathy Schoenfelder, Vice President, Cedar Rapids, IA – District office point of contact**

Kathy is Vice President of Ray and Associates. She is involved in searches conducted by the firm and will directly interact with your district and any committee that may be established on all details of this search. She joined Ray and Associates over 6 years ago after working 30+ years in the legal field.

### **Ms. Minnie Forte-Brown, Regional Search Associate, Durham, NC**

Minnie serves our firm as a Regional Search Associate, team member and background investigator and as such performs the recruiting and screening of candidates. She attended Saint Augustine's University, North Carolina Central University and Howard University. She was previously a Board member for Durham Public Schools and was also President of the North Carolina School Boards Association. She currently serves as an Adjunct Instructor at North Carolina Central University.

### **Dr. Dale Caldwell, National Search Director, New Brunswick, NJ – Lead Associate; contact information will be provided upon award of search**

Dale serves our firm as a National Search Director. He oversees major searches conducted by the firm and will directly interact with school board members and any committee overseeing the superintendent search. Dale has a bachelor's degree in Economics from Princeton University, an MBA in Finance from the University of Pennsylvania Wharton School and a Doctorate in Education Administration from Seton Hall University. He has over 39 years of experience as public school board member and 23 years of experience as board President. Dale is also certified to be a school Superintendent in New Jersey. The New Jersey School Board Association certified him as a Master Board Member (MBM) and named him the 2009 New Jersey School Board Member of the Year. He has extensive experience leading superintendent searches, addressing board conflict and providing strategic planning services for school boards.

**Dr. Michael Rush, Regional Search Director, Delanco, NJ**

Michael serves our firm as a Regional Search Director. He oversees major searches conducted by the firm and will directly interact with school board members and any committee overseeing the superintendent search. He has an earned doctorate in Educational Leadership from Nova Southeastern University and was a Superintendent, Deputy Superintendent and Principal in New Jersey for 15 years. Dr. Rush also worked with the New Jersey Department of Education for 5 years.

**Mr. Steve Cochrane, Regional Search Associate, Asheville, NC**

Steve serves our firm as a Regional Search Associate, team member and background investigator and as such performs recruiting and screening of candidates. He has a bachelor's degree in English from Princeton University and a master's degree in Education from Harvard University. He has extensive experience in the education field having served as an Admissions Officer, Residence Director, Associate Dean of Admissions, Assistant Dean of Students, Teacher, Principal, Director of Curriculum and Instruction, Assistant Superintendent for Curriculum and Instruction and Superintendent.

**Dr. Patricia Garcia, Regional Search Associate, Milford, CT**

Patricia serves our firm as a Regional Search Associate, team member and background investigator and as such performs recruiting and screening of candidates. She has a bachelor's degree in Spanish Education from the University of Panama, a master's degree in Foreign Language Education from the University of South Florida, a Doctor of Education in Educational Leadership from the University of Sarasota, and a Doctor of Philosophy in Spanish, Second Language Education from Florida State University. She has extensive experience in the education field having served as a Teacher, Assistant Divisional Superintendent and Superintendent, recently retiring as Superintendent with the Geneva City School District in New York.

## References

We have chosen several clients from our past and recent search list to demonstrate that we have been successful in various geographic locations.

SCHOOL DISTRICT	LOCATION	CONTACT PERSON	TITLE OF CONTACT	PHONE NUMBERS/ E-MAIL
Broward County Public Schools	Ft. Lauderdale, FL	Alan Strauss	Regional Superintendent (Former Chief HR and Equity Officer)	Cell: 954-347-3990 <a href="mailto:alan.strauss@browardschools.org">alan.strauss@browardschools.org</a>
Anchorage School District	Anchorage, AK	Margo Bellamy	Board President	Cell: 907-903-9820 <a href="mailto:bellamy_margo@asdk12.org">bellamy_margo@asdk12.org</a>
Calvert County Public Schools	Prince Frederick, MD	Pamela Cousins	Board President	Cell: 301-814-3225 <a href="mailto:cousinsp@calvertnet.k12.md.us">cousinsp@calvertnet.k12.md.us</a>

*This is not a complete list, and more references can be provided upon request.*

### WHAT OUR DISTRICTS SAY



★★★★★

"Ray & Associates guided a seamless and transparent process from start to finish. Kathy and Bridget facilitated each step, beginning with gathering community input and assisting the board in identifying our priority characteristics. They made sure our search was visible nationally, and the result was a large number of highly-qualified candidates. They used their considerable talent and experience to gather input from each of our stakeholder groups, which provided the board with valuable information as we faced the most important decision of our tenure. Throughout the entire process, Kathy and Bridget provided excellent communication of expectations and timelines. They facilitated a high-stakes, complicated situation with integrity and fidelity while also making it enjoyable. Their greatest strength was unifying the very different personalities and priorities of our board members, allowing us to come to a unanimous vote for our next district leader."

**Ms. Stacy Jolley, Board President & Ms. Linda Poole, Board Vice President**  
Millard Public Schools, NE



★★★★★

"Your team guided us through the process in a seamless and transparent manner making sure our search was visible nationally, gathering input from each of our stakeholder groups, and providing the Board with valuable information as we moved toward the final selection of our next Superintendent. Our point person from Ray & Associates kept us updated and was always available to respond to our questions in a timely manner. Our overall experience with Ray & Associates exceeded our expectations, and I would not hesitate to recommend your company to other school districts."

**Mr. Alan Strauss, Chief Human Resources & Equity Officer**  
Broward County Public Schools, FL



★★★★★

"As a large, public urban school district with a richly diverse student population, one of our top priorities was to conduct a national search intentionally reaching diverse candidates. Upon hire, Ray & Associates immediately heard our values and quickly proved their ability to access a multitude of resources and networks ensuring a wide range of candidates throughout our selection process. In addition to their commitment to our values, Ray & Associates was a consistent and constant guide throughout the process. Our board of education always knew what the next step in the process would be and was confident that we were prepared for effective and wise decision-making."

**Ms. Jen Schottke, Board President**  
Grand Rapids Public Schools, MI

## Search Cost: The Complete Process

The cost of our Proposal is for a complete search. The Board will be guided and assisted by Ray & Associates at every step in the search process, from the initial phase of determining the desired qualities for the position, through the actual hiring of the new Superintendent. Our process is flexible. If the Board desires a different approach or would prefer certain options other than those provided in our Proposal, we can adjust our process to meet your specific requirements.

### Cost Breakdown

The fee for performance of the Superintendent search by the consultant as provided in this Proposal will be a not to exceed price of fifty thousand dollars (\$50,000.00). If the Board selects only certain elements offered in this package, or requests services not included in this package, our fees and reimbursed expenses will be adjusted accordingly. Ray & Associates will discuss any modifications relating to the search fee regarding our services at the formal presentation.

The Superintendent search fee shall be paid in three (3) installments; 1/2 of total fee is due upon signing of the contract; 1/4 of fee is due at the time of the stakeholder meetings; and the final 1/4 of fee is due when the Superintendent is officially hired by the District.

We will provide the Board with criminal, civil litigation, social security, motor vehicle and sex offender registry and verification of educational degrees for the top (2-3) candidates at no additional fee. There is no charge by Ray & Associates for the services to assist the Board in negotiating a contract with the new Superintendent and the development of the contract terms.

**Consultant Reimbursed Expenses:** Search expenses, including travel, lodging, meals, shipping, and other related items will be kept to a minimum and are to be reimbursed by the District. Said expenses will be invoiced as they occur and will include a detailed account listing.

**Candidate Expenses:** Many Districts reimburse candidates for interview expenses, such as travel, lodging and meals for the candidate and spouse. In this case, Candidates will submit all receipts and expense documentation to a designated individual at the District. Said expenses will be paid by the District as they occur.

**Cost Saving Expense Options:** Ray & Associates. is aware of budget concerns and offers several cost saving options including:

- Conduct meetings with our consultants via Zoom to minimize Associate travel expenses
- Review and utilize meeting materials electronically via email, shared drive, etc.
- Conduct First Round Candidate Interviews via Zoom to reduce candidate travel expenses

# ESTIMATED COST SHEET – CHARLOTTE-MECKLENBURG SCHOOLS

Ray & Associates will spend as much time as needed to conduct a successful search for Charlotte-Mecklenburg Schools. **Please Note: Our flat fee is inclusive of all services.** The only hourly rates that would apply would be for requests above and beyond this Proposal; these rates run from \$50/hour for administrative work and \$200/hour for Associate work.

## Travel:

Airfare.....	2,500.00
Ground Transportation (mileage billed at IRS rate per mile).....	1,500.00
Hotel .....	600.00
Meals .....	400.00
*Travel Subtotal .....	<u>\$5,000.00</u>

\*Expenses may be less if the district utilizes virtual meetings

## Board Approved Advertising:

Advertising expenses are stated separately as they are dependent upon each District and their unique needs. Our Associates make recommendations, and the Board has the final authority on frequency and dollars spent. Ray & Associates *does not collect a commission* for placing the ads. The average spent on advertising by a District is \$1,200 to \$1,500.

Advertising Expenses .....	<u>\$1,500.00</u>
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**\*\*NOT TO EXCEED COST..... \$50,000.00**

\*\*Does not include estimated candidate expenses for interviews.

## Candidate Expenses:

The actual number of candidates interviewed is at the discretion of the Board. The estimated cost to interview a candidate is approximately \$2,000. This estimate is dependent on the candidate's geographic location and the Board's reimbursement policy. Candidate travel expense reimbursement is the responsibility of the District.

**All expenses are estimates, based on past experiences. Charlotte-Mecklenburg Schools will be billed only for actual expenses incurred.**

## Final Remarks

**Satisfaction Guaranteed:** Ray & Associates provide a termination provision in our contractual agreement with Charlotte-Mecklenburg Schools. If Charlotte-Mecklenburg Schools or Ray & Associates terminate this agreement, Charlotte-Mecklenburg Schools will be charged only for the work performed and expenses incurred up to the date of termination.

If the Board is dissatisfied with the new Superintendent within two (2) years from the date of employment, and if either party dissolves that relationship by resignation or termination within that time period, Ray & Associates will conduct a new Superintendent search at no cost to the district. The only expenses the district would be responsible for in the new search include associate travel, candidate interview expenses and advertising costs. The resignation or termination clause does not include acts of God, health issues, or the awarding of severance payment to the departing Superintendent.

In addition to this, we do not recruit candidates we have placed for a minimum of 5 years.

**Confidentiality:** The nature of our work and our ability to carry out our responsibility to you is directly related and dependent upon our present and past experience in providing similar services to others. Ray & Associates will preserve the confidential nature of any information which becomes available to us resulting from the services rendered to the Board.

At Ray & Associates, it's our job to take the pressure off your team. The details and process are our specialty, and you will see this in every step of the search. Our priority is to guide your focus toward the big picture, allowing you to focus on learning more about the potential leader for your District, asking critical questions, and shaping the future for your students.

Should you have any questions about this Proposal, please do not hesitate to contact us at [kathy@rayassoc.com](mailto:kathy@rayassoc.com) or via phone at 319-393-3115.

**Thank you for your time as you make this decision to shape the future of your District. We are extremely pleased to be considered as your partner in the process to identify and engage your next visionary leader.**

**IV. RFP CONTACT**

With the release of this RFP, please address all communications and questions to the Board’s General Counsel, André F. Mayes, by electronic mail: [superintendentrfp2023@cms.k12.nc.us](mailto:superintendentrfp2023@cms.k12.nc.us). In order to maintain the highest ethical standards, except as instructed in this document, please do not contact individual Board members or CMS staff during the RFP response and selection period, January 13, 2023 – February 2, 2023. After the proposal deadline, you may not communicate with the RFP contact or any other CMS official or employee, except to respond to a request from the RFP contact.

RFP Contact Information

André F. Mayes  
General Counsel  
Charlotte-Mecklenburg Board of Education  
Charlotte-Mecklenburg Government Center  
600 East Fourth Street, 5<sup>th</sup> Floor  
Charlotte, NC 28202  
980-343-6228

**V. SUBMISSION INSTRUCTIONS**

1. Firms interested in responding to this RFP, should respond in electronic format. Please submit your final proposal to André F. Mayes, [superintendentrfp2023@cms.k12.nc.us](mailto:superintendentrfp2023@cms.k12.nc.us).
2. Firms must supply the necessary information to this RFP no later than **Thursday, February 2, 2023** by close of business. Any proposals submitted after close of business on **February 2, 2023** will not be considered.
3. Only information received electronically in response to this RFP will be evaluated. Any oral communication is considered unofficial and non-binding.

Responder has read and understands the conditions (if any) set forth in this RFP and agrees to them without exception. Please include a signed copy of this entire document with your RFP response.

Name: *Layly Schoenfelder*

Company: *Layly & Associates*

Date: 1/28/23

**DISCLOSURE**

Please be aware responses to this RFP may be subject to disclosure under the North Carolina Public Records Act. If your firm is selected as the Board’s search partner, financial terms of the agreement will be public information. For clarification, please contact the Board’s General Counsel at 980-343-6228.