



The Charlotte-Mecklenburg Board of Education

RFP Evaluation Criteria

Approved: January 25, 2023

The Superintendent Search Committee will evaluate proposals based on the following minimum and comparative criteria. When all evaluation is complete, the top firms, based on the evaluation rubric ranking will be interviewed by the search committee to close the process.

Minimum Criteria: Each proposal must meet all the following criteria in order to be considered for further evaluation:

1. Must be submitted no later than the RFP due date.
2. Completed all items (1-6) listed in “Proposal Requirements” below.
 1. Provide an introduction;
 - i. the cover or first page of your proposal, please provide contact information, including name, title, address, email, and phone number.
 - ii. Please provide a brief introduction describing why you would be a good partner on this project and how you will highlight Charlotte-Mecklenburg Schools and Mecklenburg County to attract strong candidates.
 2. Propose your approach for this project;
 - i. This section is where you tell us how your solution meets and/or exceeds our needs. Then, please describe how you would deliver the solutions you outlined in Section II. Scope of Work. This section is a critical component of your proposal and should include a detailed description of your work plan and project organization. In addition to a comprehensive timeline and description of services provided, this section should include an initial outline of how your firm will identify and recruit diverse, knowledgeable, and qualified candidates who are ready to tackle the ambitious goals set forth by the Board in partnership with parents, educators, students, and members of the broader community. Please be concise. Feel free to use any medium (e.g., graphics, links to your work, etc.) that helps make your case.
 3. Share your background and qualifications;
 - i. Describe your firm’s history, structure, strategy, and work. Focus on your ability to be a good partner on this project. Please list any relevant awards your team has received. Specifically, this should include:



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1. A summary of your firm's experience in conducting executive searches including, but not limited to, executive searches for superintendents, educational leaders, or comparable leadership positions in municipal, county, or state government. It is preferred that applicant firms or consultants have recent experience in conducting a successful search (selection of a candidate and acceptance of a position, as facilitated by your firm) for a superintendent of an urban K-12 school district with at least 50,000 students.
2. A detailed list of assignments in K-12 education, including the names of client institutions, titles of positions for which searches were conducted, a brief description of the processes executed during each search, and the length of time serving each assignment.
3. A list of the steps and actions your firm has taken to make diversity, equity, and inclusion a part of their operation. The Board is looking for a partner that considers inclusive leadership in its decision-making processes and recruitment tactics. This should include evidence of commitment to and successful experience in recruiting outstanding leaders in superintendent positions, or comparable roles, from culturally and racially diverse backgrounds.
4. Conflicts of Interest/Off-Limits Policy
 - a. What are your firm's off-limits policies? Please be specific in describing how your policies affect your ability to ethically source qualified candidates for this search.
 - b. Has your firm ever had any type of financial relationship with a candidate who was included in any search involving your firm? If so, when and how was the relationship disclosed to your client?
 - c. List any current legal claims, whether officially filed or not, pending against your firm in the last 5 years.
 - d. How do you manage candidate confidentiality on a search such as this?



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4. Describe your team;
 - i. Describe your team that would work on this project. Include a list of each team member, a summary of relevant credentials and experience, and an indication of the proposed time commitment for each staff member. Make the case for why each team member will be a great partner on this project.
 - ii. Please provide bios, resumes, or whatever you think best highlights the strength of your team that will be working on this project. Define how your team will be structured; if your team includes multiple firms, please let us know how long you have worked together. Please identify and provide contact information for the lead staff person for this project.
5. Provide three references; and
 - i. Please provide three (3) client references, including contact information and details of your history with each reference. Preferably, client references should be similar in size, scope, and complexity to CMS. Note incorrect contact information will be considered as a negative reference.
6. Outline pricing structure.
 - i. Please describe and itemize all costs associated with your proposed deliverables for this search. Feel free to attach supplemental documentation describing those costs. Comprehensively describe the intended pricing structure of services (percentage-based, retained search, contingency search, flat fee, etc.) and give thorough reasoning as to why this pricing strategy fits with the services provided.

Comparative Criteria: The Committee to evaluate the proposals received that have been determined to meet the minimum evaluation criteria listed above. Any proposals that do not meet all the minimum criteria will be judged as nonresponsive and not reviewed further. The Committee will consider the following comparative criteria:

Comparative Criteria A: Caliber of Organization

The Committee will review the proposals in conjunction with any materials provided by the firm to determine relative experience, ability to meet established timelines, and professional ethics and commitment to diversity, equity, and inclusion within the organization and in recruitment efforts



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Comparative Criteria B: Quality of Materials

Committee will review the proposals in conjunction with any materials provided by the superintendent search firm to determine relative quality, readability, responsiveness to the RFP, and understanding of the superintendent search process as well as the role of the superintendent search firm. Proposals that simply reiterate the scope of services or do not demonstrate understanding of the role of the superintendent search firm for this proposal do not meet these criteria and will be considered as does not meet.

Comparative Criteria C: Quality of References

References will be evaluated to identify the ability and quality of previous relevant work.

Comparative Criteria D: Pricing

The Committee will evaluate the pricing scenario(s) provided to determine which scenario best suits the needs of the search