



Charlotte-Mecklenburg Schools
**SEARCH
PROPOSAL**

SUPERINTENDENT

Charlotte, NC
January 22, 2023

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Mr. Andre F. Mayes, General Counsel

Dear Mr. Mayes and Members of the School Board:

Thank you for the opportunity to present an overview of **SCHOOL EXEC CONNECT** and the services we can provide for your superintendent search. Our firm prides itself on delivering a quality search process that will result in a great leader for Charlotte-Mecklenburg Schools.

- **SCHOOL EXEC CONNECT**, founded in 2004, is in its eighteenth year. Our diverse firm is comprised of more than 60 men and women who have been leaders in quality school districts throughout the country. We have an unusually high degree of success, which we attribute to the quality of our associates, the excellence of our protocols, and our ability to find the best educational leaders who match the needs of our clients.

We define our success by the longevity of the leaders we place, our repeat services to client districts, and the positive and long-lasting relationships we establish with the boards with whom we work. We will understand your strengths and needs through conversations with the members of the Board, staff, and your entire constituency. Our recruitment and interview process aligned to this understanding will result in well-vetted, highly qualified candidates from which to make your selection of a new superintendent.

Thank you for considering our proposal for your superintendent search. We would enjoy working with you to achieve the mutual goal of finding outstanding leadership for the students at the Charlotte-Mecklenburg Schools.

Sincerely,
Kevin O'Mara Ed.D, President
SCHOOL EXEC CONNECT

kevin.omara@schoolexecconnect.com
708.516.0793



Executive Summary

CONSULTANTS

Dr. Kevin O'Mara, President

kevin.omara@schoolexecconnect.com | 708-516-0793

Dr. John Farrelly, Associate

john.farrelly@schoolexecconnect.com | 252-489-6483

PROPOSED TIMELINE

- **Phase A:** Opening the Search (January 2023)
- **Phase B:** Creating the New Superintendent Profile (February-March 2023)
- **Phase C:** Developing the Candidate Pool (January-March 2023)
- **Phase D:** Selecting the Candidates (April 2023)

COSTS

- **Consulting Fee:** \$29,500
- **Expenses not to exceed:** \$17,500

OUR GUARANTEES

01

In the event that the first slate of candidates does not include a superintendent the Board wishes to hire, the Consultants will continue to bring candidates forward for actual expenses only until the Board has found a superintendent to whom they wish to offer a contract. No additional consulting fees will be charged.

02

If the Superintendent leaves for any reason within twenty-four months of the starting date, the Consultants will conduct a new search for no additional Consulting Fee. The Board will pay only the actual expenses of the search as listed above under Expenses.

03

SCHOOL EXEC CONNECT guarantees that our consultants will not recruit your new Superintendent for the duration of his/her first two contracts.

Management Summary

Our understanding of the search services required and an overview of how **SCHOOL EXEC CONNECT** will provide these services:

- Mutually planning and tailoring your search process and timelines with the Board
- Working closely with your District staff members who assist the Board
- Preparing and providing written materials needed for the search process
- Assisting the Board in establishing criteria for a New Superintendent Profile including desired qualifications and leadership attributes
- Accepting applications on the **SCHOOL EXEC CONNECT** website with links to your District's website
- Using our national network to recruit candidates meeting the qualifications established by your Board
- Presenting a slate of qualified and well-vetted candidates to the Board
- Preparing the Board for first and second interviews
- Facilitating Board interviews at the Board's request
- Preparing Interview Committees for interviews
- Assisting the Board with contract negotiation and compensation recommendations
- Communicating diligently with the Board and staff throughout the search
- Assisting with news releases announcing the new Superintendent

Why is **SCHOOL EXEC CONNECT** so successful?

We are one of the leading private search firms because we give school districts the personalized and individualized services each search deserves. Our firm is diverse, comprised of consultants who are knowledgeable and work closely together. We are large enough to have a robust network, but are small enough to give your District the focus and attention your search needs.

Company Profile

SCHOOL EXEC CONNECT'S HISTORY

SCHOOL EXEC CONNECT is a two-proprietor corporation founded in 2004 in Highland Park, Illinois. The corporation has never operated under another name and has been in continuous operation. Since its inception, **SCHOOL EXEC CONNECT** has become one of the leading educational search firms in the Midwest with 60+ consultants, more than 500 searches completed throughout the United States, and a 97% placement success rate.

SCHOOL EXEC CONNECT specializes only in executive searches for school districts, private schools, charter schools, and consortium schools.



DR. KEVIN O'MARA, PRESIDENT, SCHOOL EXEC CONNECT,

is the retired Superintendent of Argo (IL) Public Schools and currently serves as Adjunct Professor in the Department of Leadership at Concordia University Chicago. Dr. O'Mara has led more than 50 searches in the United States.

FINANCIAL

SCHOOL EXEC CONNECT has had a steady record of profit since its inception in 2004. We have never filed for bankruptcy, been sued, or involved in any litigation with a client, school district, consultant, or candidate, had any search terminated, nor been refused payment.

SCHOOL EXEC CONNECT'S BACKGROUND AND QUALIFICATIONS

- School Exec Connect has two senior Partners, twelve Partners, seven Senior Associates, and forty-one Associates working out of eight states.
- Partners, Senior Associates, and Associates working for our firm include retired superintendents, sitting superintendents, college professors, human resource directors, special education superintendents, and regional superintendents.
- Since 2004, we have successfully completed more than 500 superintendent searches for educational institutions.
- Our entire team of 60+ consultants works closely together, supporting each search to find qualified candidates from across the country that match each District's needs.
- A hallmark of **SCHOOL EXEC CONNECT** is our Annual Training Conference, where we train new associates, review our past year, improve our practices, and get to know each other better to assure ongoing support and communication for our work together.
- We stay informed on legislative changes that affect school districts.
- All searches conducted by **SCHOOL EXEC CONNECT** have been completed on time and within budget.
- Our survey gives substantive information to School Boards about the various stakeholders' thinking. Given a large enough response, we can even report various subgroups' reactions to a variety of topics important to your District. This survey is offered in multiple languages at the Board's request.
- We have never been sued or refused any portion of payment by a district; nor have we ever had a search terminated.
- We provide complete written materials to support the needs of the District staff when preparing materials for the various search processes.
- We provide exceptional training and written materials for Boards and constituents who are involved in candidate interviews.
- The thoroughness of our community engagement gives a Board valuable information throughout the process while leaving the search decisions in the hands of the Board.
- Our record of success is outstanding. More than 97% of our superintendent placements have been in good standing with their Boards after the first contract.

Company Personnel

The consultants who will assist you with your search:



Dr. Kevin O'Mara, President | kevin.omara@schoolexecconnect.com | 708-516-0793

Kevin O'Mara has been with the firm for eight (8) years and has performed numerous searches throughout the Midwest. He is the retired Superintendent of Argo Community High School District and is currently Adjunct Professor in Educational Leadership at Concordia University Chicago teaching doctoral students and helping them pursue their principal and superintendent licensure credentials. He knows the key to great education leadership is to collaborate and let the people around him know that their dedication, knowledge and input are the key to enriching young lives. He is father to three (3) wonderful children, and husband to his wife of 35 years, Sharon. He is one of eight (8) children, and a son of two teachers. He owes his successes to the loving, supportive family he has, as well as to the truly talented people he has worked with during his career as an educator. He has served in public education for thirty (30) years as a teacher, Dean of Students, Principal, and Superintendent. Dr. O'Mara has had many accomplishments: United States State Department Fulbright Foundation candidate stationed to Argentina, Illinois High School Organization; President, Illinois Association of School Administrators Board of Directors; St. Ignatius College Prep President's Medal Awardee, and Dominican University Graduate of the Last Decade (GOLD) Awardee. He has a bachelor's degree in Mathematics from Dominican University, a master's degree in Public School Administration and a Doctorate in Educational Leadership, both from Concordia University Chicago.



Dr. John Farrelly, Associate | john.farrelly@schoolexecconnect.com | 252-489-6483

John Farrelly, Ed.D. is the retired Superintendent of Dare County Schools in North Carolina. Under his leadership, Dare County Schools was a perennial top 5 performing public school system. John has served as a superintendent for 13 years in North Carolina Public Schools. Bringing innovation to school districts has been a major focus of his visionary leadership. Among his many achievements are opening the first Biotechnology Agriscience Early College in the state of North Carolina, creating an 'Innovation Zone' in Edgecombe County Public Schools and leading a "Blue Ribbon Commission on Educational Equity". He also led transformational reform by creating the first K-8 Global Education School in Northeastern, North Carolina.

Dr. Farrelly is a 25- year educator who originally hails from upstate New York. John received his Doctoral Degree in Educational Leadership at East Carolina University where he was ranked at the top of his class. He has held numerous public school leadership roles in Special Education, K-12 curriculum and instruction, professional development, human resources and school finance. In addition, he has been an adjunct instructor at both the community college and university levels. Dr. Farrelly has held numerous state and local leadership roles including appointments by the North Carolina State Board of Education, the North Carolina Department of Public Instruction and the North Carolina School Board Association. The University Council for Educational Administration recognized him with its prestigious Excellence in Educational Leadership Award in 2016. This award was in recognition of the significant contributions he made to the nationally recognized North Carolina State University school administrator preparation program.

John is married to Rena, who, is also a public-school educator. The Farrelly's live on the Outer Banks where they are raising 11-year-old Jack and 8-year-old Cate. The family loves to play numerous sports, laugh and spend time together with friends and family. Dr. Farrelly's favorite quote is "Success is a journey, not a destination".

Complete resumes of the consultants will be sent upon request.

Reference Districts

PRINCETON COMMUNITY SCHOOL DISTRICT

Search Year: 2020-21

3,800 students

Princeton, NJ

Beth Behrand, Board President

bethbehrand@princetonk12.org

OSSEO AREA SCHOOLS

Search Year: 208-19

21,100 students

Osseo, MN

Mike Ostaffe, Board Member

763-361-7000

ostaffe@district279.org

CENTRAL BUCKS SCHOOL DISTRICT

Search Years: 2015-16

18,400 students

Doylestown, PA

Paul Faulkner, Board President

267-784-2275

LAKEVILLE AREA PUBLIC SCHOOLS

Search Year: 2010-11

11,000 students

Lakeville, MN

Judy Keliher, Chair

952-898-9747

ROCKWOOD SCHOOL DISTRICT

Search Year: 2021-22

23,500 students

Eureka, MO

Jaime Bayes, Board President

bayesjaime@rsdmo.org

ROBBINSDALE AREA SCHOOL DISTRICT 281

Search Year: 2015-16 & 2020-21

12,000 students

New Hope, MN

David Boone, Chair

david.boone@rdale.org

FOREST PARK SCHOOL DISTRICT 91

Search Years: 2020-21

750 students

Forest Park, IL

Kyra Tyler, Board President

312-399-5757

Proposed Search Plan



PHASE A: Opening the Search (*January 2023*)

- The search process begins with the signing of the Letter of Agreement.
- An initial Planning Meeting is held with the Board to establish the scope and timeline of services.



PHASE B: Creating the New Superintendent Profile (*February-March 2023*)

- Board members are interviewed to understand the qualities, skills, and experiences they seek in a new superintendent.
- Focus Groups are held with selected groups approved by the Board.
- A District-wide On-line Survey, tailored for your District, is designed to allow staff and community members to give input to the search process. This is available in multiple languages.



PHASE C: Developing the Candidate Pool (*January-March 2023*)

- The search process and calendar are posted on your District's website.
- The vacancy is advertised nationally and statewide and posted on the **SCHOOL EXEC CONNECT** website.
- The Consultants accept applications and recruit candidates who match your District's New Superintendent Profile.
- The Consultants screen and interview selected candidates face-to-face using The New Superintendent Profile.
- Internal candidates follow the same process as external candidates.
- References and Internet checks are conducted on potential candidates.
- Highly qualified candidates (typically five to seven) are presented to the Board and the Board decides whom to interview.



PHASE D: Selecting the Candidates (*April 2023*)

- The Consultants hold a Board Interviewing Workshop prior to the first interviews.
- The Consultants facilitate Board interviews of the slate of candidates and the Board narrows the field to three semi-finalists.
- Interview Committee(s) comprised of staff, parents and community members interview the semifinalists in a structured process and each member writes individual feedback.
- The Board may have the semi-final candidates give a short Formal Presentation to observe the candidates' presentation skills.
- The Board conducts a second set of interviews using feedback from the Interview Committees in a formal and informal setting.
- The Board negotiates and takes action on the new Superintendent's contract.

Proposed Search Plan

Methods to communicate with the School Board

We have found the best method to communicate with a School Board is through a Board Liaison and District Staff Liaison. We use phone, email, scanning and texting. However, we will communicate in the way best for all Board members in your District. Our consultants are available to meet with the Board in person as often as requested. During the search, we provide updates and formal reports as needed and present the Slate of Candidates. We will recommend that the Search Process, Search Timeline, and original Profile Report be displayed on your District's website for all constituents, staff members, Board members and candidates to see.

Timelines, pre-qualifications, and final recommendation processes

Our suggested timeline is listed with a detailed search description. We find that bringing a slate of five (5) to seven (7) pre-qualified candidates to the Board works the best. We then provide training for the Board to interview and reduce the slate to three (3) finalists in first interviews. We also recommend interview committees to make non-ranked, individual recommendations to the Board before their final candidate interviews. The Consultants will facilitate these interviews.

Our role in assisting the Board with candidate selection

We will provide the Board with detailed written interview guidelines, including questions for the candidates. We will provide training for the Board in interviewing techniques. We provide all written materials for the Interview Committees and may facilitate the interviews.

Recommendations for community participation

We recommend that the Board involve both citizens and staff meet the final candidates during the final interview stage and offer feedback to the Board of Education,

Information needed from Board and staff

In every search, there are specific duties and actions that can be performed only by District Board and staff liaisons. We recommend one designated Board member as the liaison for the overall communication purposes of the search and one staff member assigned to the search for logistical purposes.

Designated staff member(s) will be asked to do the following tasks:

- Send the survey link to community and post on District website
- Provide logistical support for Focus Groups
- Duplicate copy ready materials for the interview committees
- Oversee arrangements for the interview places and equipment needed for them
- Assist in making dinner arrangements for the Board and the finalist candidates. (Optional)
- Duplicate the Committee feedback for each board member after the finalist interviews.
- Assist the Board liaison and Consultants as search issues arise

Methods to identify and recruit candidates

To identify prospective candidates, we use a variety of methods. The most efficient way is through our Colleague Network. We have 60 consultants in **SCHOOL EXEC CONNECT** who work very closely together to identify candidates. Our national network has been effective in identifying candidates from out-of-state. We will use regional and state venues to advertise the position and will work with your Board to design your complete advertising approach for the position. Because candidates know and trust our firm, they will check our website and your District's website for information about your position.

Superintendent Search Work/Task Plan

BOARD

JOINT

CONSULTANT

1

PLANNING MEETING

- Timeline, process, advertising

7

FINAL PREPARATIONS

- Prepare committee(s) for interviews
- Salary research

2

COMMUNITY ENGAGEMENT

- Focus groups
- On-line survey
- New superintendent profile

8

BOARD SECOND INTERVIEWS

- Candidate presentations
- Committee feedback
- Board dinner/final interview
- Final candidate selected

3

BOARD APPROVAL

- New superintendent profile

9

FINAL DECISION

- Background check
- Contract offer

4

CANDIDATE SEARCH

- Advertise
- Network & recruit prospects
- Interview selected applicants

10

NAME THE SUPERINTENDENT

- Board action
- News release
- Introduction to community

5

BOARD WORKSHOP

- Interview Strategies

11

CLOSE SEARCH

- Inform all candidates of Board's decision
- Assist Board if needed

6

BOARD FIRST INTERVIEWS

- Five to six candidates
- Select three to move forward

12

NEW SUPERINTENDENT BEGINS DUTIES

Consulting Fee

The consulting fee for your search will be \$29,500. It is inclusive, and no hourly fees will be charged in addition. The consulting fee may be reduced and negotiated if the level of search services is reduced.

EXPENSES:

Regular expenses will not exceed \$17 w,500. These include, but are not limited to, copying, secretarial support, consultant travel expense, supplies, and interview costs.

ADVERTISING:

Advertising costs are determined and paid by the District. Options include:

- Posting on district website with link to **SCHOOL EXEC CONNECT** website
- Print and online advertising in Education Week and the New York School Boards Association
- LinkedIn targeted posting/promotion
- Connections to the American Association of School Administrators (AASA) and NYSCOSS websites
- Posting on the **SCHOOL EXEC CONNECT** website
- E-mail blasts to selected superintendents and contacts throughout the country

OTHER EXPENSE INFORMATION:

- **SCHOOL EXEC CONNECT** will invoice your District twice. First, after signing the Letter of Agreement and, second, upon the Board's approval of your new Superintendent's contract.
- After the candidate pool has been presented to the Board, the District incurs the costs of the search. This may include mileage, meals, lodging, etc.
- It is recommended that the finalist undergoes a criminal background check before a contract is signed; this option is a \$750 expense.

Our Guarantees

GUARANTEE

#01

In the event that the first slate of candidates does not include a superintendent the Board wishes to hire, the Consultants will continue to bring candidates forward for actual expenses only until the Board has found a superintendent to whom they wish to offer a contract. No additional consulting fees will be charged.

GUARANTEE

#02

If the Superintendent leaves for any reason within twenty-four months of the starting date, the Consultants will conduct a new search for no additional Consulting Fee. The Board will pay only the actual expenses of the search as listed above under Expenses.

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SCHOOL EXEC CONNECT guarantees that our consultants will not recruit your new Superintendent for the duration of his/her first two contracts.