



**Response to Request for Proposals  
Charlotte-Mecklenburg Board of Education  
Services for a Superintendent Search Partner**

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## Introduction and Executive Summary

### Contact Person:

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Charlotte-Mecklenburg Schools (CMS), which includes more than 18,000 staff members, serves more than 141,000 students across 181 schools. CMS is proud of its diverse mix of students who represent 184 countries and speak 204 languages and dialects. As learned from the Board's recent community engagement efforts, CMS is seeking a Superintendent who is familiar with CMS schools' successes and challenges, and a leader who is prepared to make bold moves on behalf of the CMS learner community. As the CMS Search Committee prepares to identify the district's next Superintendent, an opportunity emerges to develop a search process that both identifies and screens diverse talent and engages stakeholders thoughtfully from beginning to end. The district will benefit from the partnership and support of a firm that is deeply familiar with the challenges and opportunities inherent to the Superintendent's role and experienced in the development of a transparent recruitment and screening approach that mitigates bias, ensures equity in decision-making, and engages stakeholders authentically throughout the process.

**Alma Advisory Group (Alma)** is honored to submit a proposal to lead this important search for the next Superintendent of CMS. Alma is a mission-driven consulting services organization, founded by Monica Santana Rosen, a Black Latina business owner who has dedicated her career to building the capacity of leaders in education to make bold and often complex moves on behalf of their students. Alma is well-established as a trusted advisor, thought partner and consultant for many dynamic nonprofits and school systems nationally.

Alma is well-established for the strength and the diversity of talent we provide our clients. Our searches to date have featured the following results:

- Finalists presented by Alma have been 46% Black, 14% Latinx, 30% White, and 10% Asian, 1% Native American, 53% Female
- Hires selected by our clients have been 47% Black, 17% Latinx, 21% White, 13% Asian, 2% Native American, 53% Female

A superintendent search led by Alma has several distinctive offerings that are not typically provided by other firms:

- Clear focus on equity and diversity in hiring through a competency-based approach at all phases of the search process
- Customized approach and interview tools collaboratively developed to meet the unique context of the district
- Transparent, inclusive and authentic community engagement, including intentional outreach at each stage of the process to communities that have been historically excluded or difficult to reach
- Facilitated planning with the Board to confirm alignment, clarify the competencies required for the next Superintendent and reach shared agreement on the key steps of the screening and decision-making process
- Anti-bias training delivered to all interviewers, and the design and utilization of anti-biased, competency-driven interview activities and tools to mitigate bias
- Design and facilitation of a finalist stage that enables authentic engagement with community and includes anti-bias training for all participants
- Facilitation and support for the Board at each stage of the process, especially at the stage of final decision making
- Round the clock availability and support from the Alma team for individual Board trustees and regular meetings with the Board as needed throughout the process

At Alma, we believe in capacity-building at our core, and we bring that unique lens to our executive search practice. Our goal is to guide and facilitate the search process in a way that supports trustees and staff to adopt recruitment and selection best practices into their ongoing work. This includes a thorough debrief and knowledge transfer process at the completion of the search.

The team proposed to lead this project has completed a wide range of executive searches, including superintendent and nonprofit organization and charter school network CEO positions. We have worked in some of the most politically complex environments in education, and our network is strong among leaders in urban school districts and charter management organizations.

Alma's recruitment approach leverages both our team's strong networks in the education space, as well as gold-standard recruitment best practice. With a team of former education leaders, we begin our searches by scouring each of our personal networks and reaching out to colleagues for personal nominations and recommendations. These conversations often surface leaders who are highly regarded within their own organizations but may yet be unknown in national circles. In addition, we partner with our clients to create a comprehensive recruitment strategy, seeking out individuals who may not be actively looking for a new role, but show readiness for the role we're seeking to fill. We leverage our recruiter licenses through LinkedIn, national research, professional membership organizations and national posting sites where potential hires are likely to learn about the opportunity.

One of the distinguishing characteristics of Alma as a search partner is our commitment to not just communication but facilitated decision-making with the Board. Alma will work as a trusted partner with the Board to ensure they are supported throughout the search process. This includes working with board trustees to calibrate on competencies for the superintendent and facilitating the debrief and feedback process at each stage of the interview and selection process. The Alma team will seek a point of contact from the Board to meet on a regular basis to review progress on the search. Typically, we will meet either weekly or biweekly to ensure the project is moving forward on time and on schedule. This would also include review and feedback of the recruitment plan, and access to national research or tools that support and inform the decision-making by the search committee.

Our detailed cost proposal provides additional information, but Alma benchmarks its price point for superintendent searches with the fees typically allotted for CEO-level searches. Alma's fee is benchmarked at 32% of the estimated salary for the role.

Alma's distinguishing characteristics and transparent, inclusive, and equity-focused approach to the search process set us apart from others in the executive search field. As such, we are confident that we are the best qualified to support priorities the Board of Education has communicated for the search process for the next CMS Superintendent. Thank you for your thoughtful approach to this selection, and for your consideration of our firm. We welcome any questions you may have about this response.



Monica Santana Rosen  
Chief Executive Officer

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## Approach for this Project

Alma proposes the following timeline and process for the recruitment and selection of the superintendent:

### 1. Stakeholder Engagement on Organizational Priorities and Key Competencies for the Role (February)

The Alma team will meet virtually with select members of the Charlotte-Mecklenburg Board of Education and other key stakeholders to gather their input on the role and the steps of the selection process. Alma will collaborate with the Board to build off of the community engagement process that began in the fall of 2022. This will include thoroughly analyzing the feedback gathered to ensure that it is representative of geographic, demographic, and socio-economic groups in CMS. Based on this analysis, Alma will work with the Board to create a plan for any other stakeholder engagement needed as well as continued engagement throughout later stages of the search and selection process. Our approach to stakeholder engagement ensures that we reach out to members of the community who may not be typically engaged or difficult to reach through conventional methods. We incorporate feedback gained from the community into all steps of the search process, including job description, recruitment strategy and screening process design.

### 2. Role Clarification and Job Description (February to Early March)

The Alma team will review any job descriptions already created and facilitate conversations with key leaders to clarify and confirm the most important competencies required of the position, and those traits that contribute to a successful team culture within the organization's unique context. Based on these conversations, the Alma team will refine the job description with an eye toward attracting the desired candidate, and explicitly describing the leadership attributes most important for the role.

### 3. Recruitment Strategy Development and Execution (March)

Based on the role clarification, the Alma team will research the local and national market and execute a recruitment strategy, with recommended sources to recruit for top candidates, and will build a network contact list for personal outreach to help spread the word about the position and pursue nominations of high-potential candidates. Our network is strong among leaders in urban school districts and other organizations in the K-12 space. With a team of former education leaders, we begin our searches by scouring each of our personal networks and reaching out to colleagues for personal nominations and recommendations. In addition, the Alma team researches leaders in roles that are similar in scale and experience, with a priority for track records aligned with the competencies required of the role. The Alma team will then partner with the Board to build a pool of potential candidates and monitor the results of recruitment efforts. We leverage our recruiter licenses through LinkedIn, national research, professional membership organizations and national posting sites where potential hires are likely to learn about the opportunity. Our team uses an Applicant Tracking System to manage all aspects of the candidate pipeline, helping our team to stay organized throughout the search, to access real-time data for our clients, and to maintain clear and transparent communications with candidates. The system interfaces with several job boards and posting sites to maximize the views of our job postings and ensure that our postings get seen by many job seekers.

### 4. Screening Process Design (March)

In addition to designing the recruitment strategy, the Alma team will propose the steps of a screening process for the role and draft all interview tools. Decisions will include which internal team members and/or stakeholders should be engaged in the screening process, key roles in the interview process, and sequence of steps from first screen to final hiring decision. This will also include the creation of performance tasks and scenarios to assess the competencies required for the role. Our purpose is to minimize bias at every step in the process, and keep the process focused on assessing those skills most important for the role.

**5. Monitoring of Incoming Talent Pool and Initial Screening of Top Candidates (March-April)**

The Alma team will monitor incoming applications together with the Board of Education and will work proactively to ensure a strong pool of candidates continue to apply for the role. The team will meet with the organization weekly to review progress and will provide reports with clear data tracking metrics to understand the strength and diversity of the pool and status of candidates in process, including the number of candidates at each step (e.g., first screen, rejections, etc.). We will also review incoming resumes and identify top candidates for a first-round screen in partnership with our client. The Alma team will carry out first-round interviews and recommend candidates for second round interviews to be completed by the client organization. Candidate profiles will be provided for any interviewed candidates summarizing the background information along with candidate strengths, questions, and recommendation on whether to advance to finalist screen. The interview and selection process typically includes training for all interviewers with a focus on understanding bias and mitigating bias during the debrief discussion.

**6. Background Checks, Reference Checks, and Finalist Interviews and Background Checks (April-May)**

The Alma team will design second and subsequent round screening tools, developing interview guides and providing guidance for our client's leaders to facilitate in-person interviews and debrief for competency-driven interviewer feedback. During the final interview round, the Alma team will develop a customized method of collecting feedback from parents, community members, teachers, and administrators that the school board members will be able to review as they deliberate to make a final decision. Our team is particularly skilled at facilitating the feedback and debrief process with key decision makers at each stage of the selection process. The interview and selection process typically includes training for all interviews with a focus on understanding bias and mitigating bias during the debrief discussion. The Alma team will provide background and reference checks for any candidate prior to moving to the finalist stage. This will include a search of press on the candidate, conversations with 3-5 references, and any additional network background checks possible to understand the candidate's reputation, and to identify any potential optics issues that the Board would want to be aware of and/or address if they moved forward. The Alma team will provide background and reference checks for any candidate prior to moving to the finalist stage. This will include a search of press on the candidate, conversations with references, and any additional network background checks possible to understand the candidate's reputation, and to identify any potential optics issues that the Board would want to be aware of and/or address if they moved forward. As the organization engages with candidates, we will continue to calibrate on desired competencies and strengthen pre-screening as needed along the way until our client finds its chosen candidate and has an accepted offer.

**7. Contract Negotiations (April-May)**

Alma recommends that the district engage its own counsel in negotiating the terms of the superintendent's contract. However, Alma plays a very helpful role as liaison between finalist candidates and the district, identifying the top priorities for the candidates, salary expectations and other terms that will be important for the candidate. We are happy to coordinate with general counsel however helpful to ensure a smooth conclusion to the contract negotiation process.

**8. Knowledge Transfer (May)**

The Alma team will engage in a post-search debrief call to advise on which practices and lessons learned for this process can be applied to the district's longer-term approach to executive succession planning and hiring.

**9. Communication with Candidates (Throughout Process)**

One of the most important support services that Alma will provide in this process is maintaining communication with candidates throughout the selection process to ensure they stay engaged and have a positive and professional experience. This communication includes answering questions about the process, coordinating interviews, notifying candidates if they make it to the next round of interviews, and arranging travel and accommodations for finalists, as needed.

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We are well-established for the strength and the diversity of talent we provide our clients. Our searches to date have featured the following results:

- Finalists presented by Alma have been 46% Black, 14% Latinx, 30% White, and 10% Asian, 1% Native American, 53% Female
- Hires selected by our clients have been 47% Black, 17% Latinx, 21% White, 13% Asian, 2% Native American, 53% Female

Our Superintendent searches have produced the following results to date:

- Finalists presented by Alma have been 63% Black, 19% Latinx, 9% Native American, 9% White, 36% Female
- Hires selected by our clients have been 50% Black, 25% Latinx, 25% Native American, 25% Female

We maintain a clear focus on equity and diversity in hiring. Our searches yield a diverse set of candidates due to our powerful networks and recruitment and screening processes. As a racially and ethnically diverse organization of former education leaders, we leverage our diverse networks in the recruitment process. We also conduct first round interviews with a broad set of candidates, not relying exclusively on resume screening. Finally, we use our expertise to build competency-based screening processes that mitigate bias, and help our clients stay grounded in the skills most important for the role.

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## Service Provider Background and Company Qualifications

Alma has conducted executive searches since 2017 and has supported more than 50 executive searches across the country. Our team has been able to work with organizations both small and large, young, and longstanding to recruit talented individuals to fill critical roles. We work to support executive searches of cabinet-level leaders as well as superintendents. Alma has a national reach and particular expertise in urban districts. We prioritize a record of demonstrated success and evidence during the screening process with candidates. This includes demonstration of their ability to improve outcomes for all students.

*Superintendent Placements* - Below are descriptions of most of Alma's Superintendent and CEO searches from the last five years, all of which remain in their positions.

### Superintendent, Eugene 4J Public Schools

Alma supported the Board of Eugene 4J during the search for the Superintendent during a tumultuous time for the Board. Alma's CEO supported the Board as they worked to ensure shared alignment on the requirements of the role, as well as the Board's shared ways of working together throughout the process. Ultimately four finalists emerged, which included two Black men, 1 Native American man, and 1 white woman. In the spring of 2022 the Board ultimately selected an internal district leader, who is Native American. Along the way Alma partnered closely with the Board, leading planning retreats and training the Board and stakeholders on managing bias throughout the process.

### Superintendent, Denver Public Schools (DPS)

In June 2021, Alma completed the executive search for the next superintendent of Denver Public Schools. Denver Public Schools is the largest district in Colorado, serving about 90,000 students in 200+ schools and facing challenges with declining enrollment. To support this effort, the Alma team facilitated comprehensive community engagement and input meetings with stakeholders alongside members of the DPS Board of Education to collaboratively define competencies and determine attributes of the new superintendent. Alma actively sourced for the position nationally and we designed each step in the interview process, to include opportunities for the community to meet and interact with finalist candidates. The finalist candidates in this search included one Black man, one Afro-Latino man, and one Latinx woman.

### Superintendent, Cincinnati Public Schools (CPS)

In March 2022, Alma completed the executive search for the next superintendent of Cincinnati Public Schools. Cincinnati Public Schools is the 3rd largest district in Ohio, serving approximately 36,000 students in over 65 schools. To support this effort, the Alma team facilitated comprehensive community engagement and input meetings with stakeholders alongside members of the CPS Board of Education to collaboratively define competencies and determine attributes of the new superintendent. Alma actively sourced for the position nationally and we designed each step in the interview process, to include opportunities for the community to meet and interact with finalist candidates. The finalist candidates in this search included one Black man and two Black women.

### Superintendent, Evanston Township High School (ETHS)

Alma worked with the Board of ETHS as they carried out the selection of the district's next Superintendent following the 17 year tenure of the outgoing and well-respected Superintendent. In support of this process Alma designed and facilitated a community engagement process to understand the perspectives of the Evanston Township community, and then worked with the Board to clarify the requirements for the next Superintendent. With Alma's partnership, the Board made the decision to allow an internal successor to apply for the role, and to interview with community members directly as the sole finalist. A longtime educator and administrator in the district, Marcus Campbell was assessed against the competencies of the role instead of being assessed against other candidates. This process was more fair to the internal candidate, as well as potential external candidates. Dr. Campbell was received well by the community upon his announcement, with the Board of 7 women leaders presenting him with a shirt that said "Team of 8," which they all were wearing as well. The strong stance of support for the district's first-ever Black male Superintendent was inspiring to the



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community, the Board and to the Alma team as well.

#### Chief Executive Officer, Prospect Schools

In April 2021, Alma successfully led an executive search for the next CEO of Prospect Schools, a charter management organization based in Brooklyn, NY. Prospect Schools is a 6-school charter school network serving approximately 1600 students. To support this effort, the Alma team partnered closely with the Transition Committee of the Prospect Schools and Brooklyn Prospect Boards. We partnered with the head of HR and Talent to plan and execute the stakeholder engagement strategy, we sourced for the position nationally, and we designed each step in the interview process, which included opportunities for the staff and community to meet and interact with finalist candidates. The finalists in this search included one Asian American man, one Black man, and one Black woman.

#### CEO, Citizen Schools

The Alma team supported Citizen Schools with their Chief Executive Officer search during the summer of 2021. For over 25 years, Citizen Schools, a nonprofit education organization, has worked to help all students thrive in school and beyond through hands-on learning and career mentors. The Alma team worked collaboratively with the board of directors to establish the job description for the role, market the organization and the opportunity to talent engaged in passive searches, vet potential candidates for each position, and develop an aligned screening process to measure the competencies identified for the role. The finalists in this search included one Black man, one Latino man, and one white woman.

#### CEO, Teach Plus

Teach Plus is a national nonprofit whose mission is to empower excellent, experienced, and diverse teachers to take leadership over key policy and practice issues that advance equity, opportunity, and student access. In August 2021, Alma Advisory Group worked closely with the Board to design and facilitate the selection process for their third Chief Executive Officer. To support this effort, the Alma team facilitated comprehensive stakeholder engagement and input meetings with their regional directors, teacher leaders, internal staff members and key partner organizations. Through our dedicated sourcing and outreach efforts, the search resulted in the selection of Kira Orange Jones, the first Black woman CEO in the organization's history.

#### President, Integration Charter Schools

Alma Advisory Group had the privilege of supporting Integration Charter Schools (ICS) in the search for the next President of ICS, who has the opportunity to serve as the primary leader of the organization and will embrace the responsibilities associated with the most senior leadership role in the network. The President has the honor of working and leading actively in schools across the network and reports directly to the ICS Board. The work of the President requires intentional and persistent connection with Staten Island to appreciate the unique characteristics of this community.

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Additional examples of some of our cabinet level searches are also included below.

### Guilford County Schools

The Alma team supported Guilford County Schools (GCS) with their executive recruitment and hiring efforts for several Cabinet level leadership positions, including Chief Operations Officer (completed May 2021), Chief Student Services Officer (completed June 2021), Chief Academic Officer, Assistant Superintendent of Special Education Services (completed August 2020), Chief Innovation Officer, and Chief Performance and Accountability Officer. Similar to other searches, our team began this search by first clarifying the competencies most important to support Guilford County Schools' success and created a hiring process to identify a strong pool of talented and diverse candidates. The Alma team established job descriptions for each role, vetted potential candidates for each position, and developed an aligned screening process to measure the competencies identified for each role. As our team completes these searches, we are also helping the HR team document its process for succession planning and attracting and hiring strong executive leadership moving forward. Guilford County Schools has over 72,000 students.

### Chicago Public Schools

Alma supported Chicago Public Schools (CPS) with a search for several key positions in the district including the Chief Financial Officer, Chief Officer of Diverse Learner Supports and Services and for the Budget Director during the 2017-18 school year. CPS has over 400,000 students. To support the Budget Director search, Alma worked with key staff at CPS to clarify the leadership competencies most important for this role and defined a recruiting and screening approach to identify a strong pool of candidates. Over the course of the project, the Alma team delivered an updated, competency aligned job description for the position, a rigorous screening process, and a robust and diverse applicant pool, which yielded 80 candidates sourced overall, of which 40% were leaders of color and 35% female, with a mix of experience internal and external to education. Ultimately 4 finalists were identified for in-person interviews, of which 75% (3) were leaders of color and 25% (1) female, and at least 2 candidates were considered for roles beyond the Budget Director position itself.

### **Diversity, Equity, and Inclusion**

As a minority and female owned and led organization, diversity, equity, and inclusion are at the forefront of who Alma is and how we approach our work.

As the examples above highlight, we have a strong track record of recruiting leaders from culturally and racially diverse backgrounds. In order to recruit talented and knowledgeable candidates with diverse backgrounds, we ground our search in a competency-based process. The competencies are also developed after community engagement ensuring that they represent the viewpoints of a diverse set of stakeholders.

We also ensure that each individual participating in the interview and selection process receives anti-bias training. Alma also facilitates the debrief process following each interview round. This ensures that the selection process evaluates candidates against these critical attributes, leaving out subjective or tangential criteria. Finally, we also help to support a knowledge transfer process that provides valuable feedback on support needed to ensure a successful transition and set the new leader up for success.

### **Conflicts of Interest/Off-Limits Policy**

We strive to identify and place candidates who intend to thrive in the districts in which they are hired for years, and do whatever we can to support them to be successful in this regard. We do not actively solicit candidates we have placed in superintendent positions.

Alma has never had a financial relationship with a candidate connected to a search conducted by our team. The education community is very interconnected and Alma has been recognized for our customized approach and referred for new consulting or search projects by current and former clients.

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### **Current Legal Claims**

Alma does not have any current or pending legal claims filed against the firm in the last 5 years.

### **Managing Candidate Confidentiality**

While Alma prides itself on conducting a transparent search process with frequent community updates and meaningful engagement, we also understand the importance and need for confidentiality at key moments during the search process for the school district and the prospective superintendent candidates.

Because we have a history of cultivating a strong and diverse candidate pool, we encounter potential candidates who may not be looking for a new opportunity. Additionally, we know that potential candidates for the superintendent role are likely serving in high profile positions that could be in jeopardy if his/her candidacy were to become public. The education community is so interconnected, we also strongly encourage members of the board/selection committee to resist the temptation to reach out to their network to discuss current applicants. If necessary, we also have the option of asking Board members and staff to sign a confidentiality agreement when we share candidate information.

It is our practice to share candidate materials for only those candidates who are moving forward to the next interview stage. Finally, when candidate debrief discussions must be held in a public forum, as is the case in some public school districts superintendent searches, we will use identifiers so that we are not using names during that time. At the finalist round, the names of the final candidates are typically made public and we invite stakeholders to submit questions for candidates and to nominate themselves (or others) to serve on a final round interview committee.

## Our Team

The project team detailed below has collectively led more than 50 executive searches, 8 of which have been superintendent and nonprofit organization and charter school network CEO positions. Alma has conducted executive searches since 2017. Resumes are provided in Appendix B.

### Contact Person:

Monica Santana Rosen, Chief Executive Officer  
Alma Advisory Group  
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Web: [www.AlmaAdvisoryGroup.com](http://www.AlmaAdvisoryGroup.com)

### Monica Santana Rosen, Chief Executive Officer, and Search Lead



Monica was born to immigrant parents who instilled in her a deep value for education. Monica spent the last two decades working to build strong diverse workplaces and enable leaders to do great work. Her career began in philanthropy with the Tiger Foundation, where Monica was part of a team that supported nonprofits working to break the cycle of poverty in New York City. Monica later served as the Executive Director for Management Leadership for Tomorrow (MLT), an organization working to diversify leadership in the upper ranks of the public and private sectors. Monica helped launch MLT's MBA-Prep program before pursuing her own MBA at Harvard Business School.

Monica joined Chicago Public Schools in 2004. She helped lead an HR redesign effort, and then managed and led the 65-staff member HR operational team at CPS. During her tenure, average transaction turn-around time improved from 8 weeks down to 3 days, call answer rates from 45% to 93%, and first call resolution from 45% to 75%. Monica then served as Talent Management Officer, where she focused specifically on leadership pipelines for the district. She spearheaded the redesign of a principal screening process, launched a national principal recruitment effort, and supported the strategic promotion, support and succession planning for principals. She also established the Leadership Development and Support unit, where she oversaw the district's Principal Induction program and support for the district's 26 Chief Area Officers (i.e., principal supervisors). In 2012 Monica launched a human capital consulting practice for Cross & Joftus, and in the fall of 2016, Monica ventured out to develop Alma Advisory Group, LLC with a talented and diverse leadership team, supporting organizations nationally to hire, develop, support and retain a high-quality workforce.

### Sylvia Flowers, Managing Director Talent Acquisition and Executive Search



Sylvia is a native of St. Louis, holds a B.S. in Chemical Engineering and an M.B.A. from the Darden Graduate School of Business at the University of Virginia. Before dedicating her career to improving public education, she spent eight years in the private sector working as a chemical engineer for Monsanto and a finance profession for Duke Energy. She then joined the Broad Residency in Urban Education and began her education career in the Christina School District in Wilmington, Delaware. Sylvia also worked for Chicago Public Schools implementing the district's first Teacher Incentive Fund grant pilot program in 40 high-needs schools. In 2009, she moved to Nashville, Tennessee and later served as the Director of Technical Assistance at the State

Collaborative on Reforming Education (SCORE), a nonprofit and non-partisan advocacy and research organization founded by former U.S. Senate Majority Leader Bill Frist. Most recently, Sylvia spent seven years at the Tennessee Department of Education as the Executive Director of Educator Effectiveness and Talent, focused on implementing the state's educator education evaluation system and using human capital data to drive statewide policy, strategy, and technical support for districts in the recruitment, retention, compensation, professional growth, and recognition of effective educators.

**Najjah Thompson, Talent Acquisition**



Najjah is a native of Miami, FL., and holds a BA in Music Education and MM in Music Performance from the University of Miami. He is currently pursuing a MS in Learning and Organizational Change from the School of Education and Social Policy at Northwestern University. Najjah started his career in education and public service as a Servant Leader with the Children’s Defense Fund’s Freedom Schools Program. In 2015, he began teaching elementary and secondary music at Chicago Public Schools. After a few years of teaching, he transitioned to administration and became the Arts Education Specialist in the department of Curriculum and Instruction for the Madison Metropolitan School District. Most recently, Najjah transitioned to HR and spent three years leading Madison Metropolitan School District’s Recruitment and Engagement Strategy where he

was able to successfully increase the number of highly-qualified diverse teachers and district administrators.

**Deidre Hargrove-Krieghoff, Talent Recruitment**



Deidre is an experienced HR and Operations professional who has spent more than 25 years serving in various roles in human resource leadership, operations, and development, in both private and nonprofit spaces. She most recently worked at the Madison Metropolitan School District (MMSD) where she served as the Chief of HR and Senior Executive for Workforce Development. During her tenure the HR team increased their department diversity by 30%, district administrator diversity by close to 10% and teacher diversity to 15%. Prior to working at MMSD Deidre served as the VP of Workforce Development for the Urban League of Greater Madison (ULGM). Deidre is a trained Malcolm Baldrige National Quality Award Examiner. She holds a bachelor’s degree in Business Management and Communications from Concordia

University and a master’s degree in Business Administration from the University of Wisconsin – Madison.

**Nita Losoponkul, Talent Analytics**



Nita has spent the last two decades working domestically and internationally in both the public (K-12 education) and private (energy, hospitality, financial services, consulting) sectors. She has led projects to implement change initiatives and drive process improvements, including designing and delivering talent development curriculum to support the change. As the Director of Innovation and the Director of Talent Acquisition at the Washoe County School District, she launched new high school magnet programs to create new opportunities for students and revamped hiring processes. At Public Impact, she worked with school districts across the country to plan and implement an Opportunity Culture, creating new career pathways for teacher leaders with sustainably funded higher compensation. Nita holds a bachelor’s degree in Engineering from the California Institute of

Technology, a master’s degree in Business Administration from the University of California at Los Angeles, and a master’s degree in Educational Leadership from the Broad Center (now part of the Yale School of Management). She is also qualified as a Project Management Professional (PMP) and a Human Resources Senior Certified Professional (SHRM-SCP).

**Sidney Kabotie, Community Engagement**



Sidney is a member of the Whistling Water Clan of the Apsaalooke peoples, a child of the Hopi Snow Clan and child of the Winter Clan of the Santa Clara Pueblo peoples. He received his Masters degree in Diversity and Inclusion Leadership from Tufts University in May of 2021, and is a trained consensus builder, particularly focused on strategic planning with Tribal communities, leadership and stakeholders to help them formulate their responses to an array of priorities that are of concern to Native peoples locally, regionally and nationally. His facilitation and planning experience includes facilitating conference sessions with Native artists, community members, educators, political leaders and non-Native allies working to find ways to effectively address issues of invisibility that Indigenous Peoples experience in American consciousness.

**Venus Velez , Talent Development, Community Engagement**



Venus brings over 20 years of experience in the field of education, with a focus on equity and excellence. Venus spent the earlier part of her career working in non-profit educational organizations, developing and leading college preparation programming for high school students from underserved communities. She then went on to work with the NYC Department of Education (DOE), initially supporting high school reform efforts, working with a team of school leaders to phase out larger failing campus high schools and replace them with a more successful model of new small specialized high schools. Working closely with the Superintendent, Venus led the creation of a new parent engagement office in a region serving 139 schools. After leaving the NYC DOE, Venus continued her work in education

supporting non-profit educational organizations, working on talent searches for educational leadership roles, and supporting other district level reform efforts. Venus completed her undergraduate work at Wesleyan University, the Education Policy Fellowship Program at Columbia University, Teacher’s College, and holds an MBA from the Zicklin School of Business.

## References

### **Reference #1:**

Company/School Name: Cincinnati Public Schools  
 Contact Person: Eve Bolton, Board member and co-chaired the Superintendent Search  
 Email: [boltone@cpsboe.k12.oh.us](mailto:boltone@cpsboe.k12.oh.us)  
 Telephone: 513-363-0123  
 Dates of Service: 2021-22  
 Description of Services Provided: Superintendent Search

### **Reference #2:**

Company/School Name: Denver Public Schools  
 Contact Person: Scott Esserman, Current Board member, community member during search  
 Email: [sdesserman@gmail.com](mailto:sdesserman@gmail.com)  
 Telephone: 303-909-2493  
 Dates of Service: 2021  
 Description of Services Provided: Superintendent Search

### **Reference #3:**

Company/School Name: Evanston Township High School District 202  
 Contact Person: Pat Savage-Williams  
 Email: [savagep@eths202.org](mailto:savagep@eths202.org)  
 Telephone: 541-520-6083  
 Dates of Service: 2022  
 Description of Services Provided: Superintendent Search

### **Reference #4:**

Company/School Name: Guilford County Schools  
 Contact Person: Shirley Morrison  
 Email: [morriss@gcsnc.com](mailto:morriss@gcsnc.com)  
 Telephone: 336-370-4534  
 Dates of Service: 2017 - present  
 Description of Services Provided: Executive Search and Transition Team Support

## Pricing Structure

Alma benchmarks its price point for Superintendent searches with the fees typically allotted for CEO-level searches. Alma's fee is benchmarked at 32% of the estimated salary for the role. (More typical CEO search firms charge 34% to 35% of expected total compensation for a similar search).

A Superintendent search completed by Alma has several distinctive offerings that are not typically provided by other firms. In addition to recruitment of diverse and mission-aligned candidates for this search, our fee includes the following key services:

- Facilitated planning with the Board to confirm alignment and clarify the competencies required for the next Superintendent, and reach shared agreement on the key steps of the screening and decision-making process
- Guidance to ensure transparency in the search, and intentional communication with the community at each stage of the process
- Design of anti-biased, competency-driven interview activities and tools to be used by everyone participating in the process
- Design and facilitation of a finalist stage that enables authentic engagement with community and includes anti-bias training for all participants in the process
- Facilitation and support for the Board at each stage of the process, especially at the stage of final decision making
- Round the clock availability and support from the Alma team for individual Board members and regular meetings with the Board as needed throughout the process
- Paid postings for advertising the position

To meet these supports, Alma typically charges a fee benchmarked at 32% of the predicted salary. With an estimated salary of \$275,000 for this role, our fee to complete this search is \$88,000 plus up to \$11,000 for Alma team member's travel, overhead, advertising and mailing costs. Total amount not to exceed \$99,000.

Work completes when a successful candidate is hired, which we expect will be within 4 to 6 months of project launch, however, will continue until the search is complete. We propose the following invoicing schedule:

- 50% (\$44,000) upon execution of the contract and confirmation of the project timeline and milestones.
- 30% (\$26,400) upon posting of the job description, delivery of first set of first-round interview guides including interview questions, and first set of candidates delivered, typically 4 to 6 weeks following the search launch.
- 10% (\$8,800) when second round screening materials, including all interview questions, scenarios and performance tasks, are delivered and satisfactory delivery of finalist candidate pool, typically 8 to 12 weeks after search launches, and runs through completion of interview process.
- Final payment of the remaining 10% (estimated at \$8,800) but confirmed based on salary offered and accepted) when selection/offer decision made, typically within 4 months, but can take longer. This will include the completion of finalist interview activities and materials, including structure and design of any virtual stakeholder-related town convenings and interviews to engage with finalists.

Expenses invoiced separately as cost is incurred.



## Appendix A: Women/Minority Business Enterprise Certification

# CMS

ILLINOIS

JB Pritzker, Governor

DEPARTMENT OF CENTRAL MANAGEMENT SERVICES

Janel L. Forde, Director

June 17, 2022

Monica Santana Rosen  
Alma Advisory Group, LLC  
1525 E 53rd Street  
Suite 530  
Chicago, IL 60615-4575

Dear Business Owner:

Re: **NCA Certification Approval** Women/Minority Business Enterprise (WMBE)  
Certification Term Expires: June 21, 2023

Congratulations! After reviewing the No-Change Affidavit (NCA) information you supplied, we are pleased to inform you that your firm has been granted continued certification under the Business Enterprise Program (BEP) for Minorities, Females and Persons with Disabilities.

This certification is in effect with the State of Illinois until the date specified above as long as you continue to submit annual No - Change Affidavits and are found to still meet the requirements of the Program.

Your firm's name will appear in the State's Directory as a certified vendor with the BEP in the specialty area(s) of:

**NIGP 91838: EDUCATION AND TRAINING CONSULTING**  
**NIGP 91865: HUMAN RESOURCES, RELATIONS CONSULTING**  
**NIGP 91875: MANAGEMENT CONSULTING**  
**NIGP 91883: ORGANIZATIONAL DEVELOPMENT CONSULTING**

Also, please be advised that this certification does not guarantee that you will receive a State contract. Please visit the Vendor Registration page on [www.opportunities.illinois.gov](http://www.opportunities.illinois.gov) and be sure to register with each of the Procurement Bulletins listed so that you are notified of upcoming solicitations in your NIGP codes. Certification with the Business Enterprise Program does not ensure you receive notifications; you must also register with the Procurement Bulletins.

Thank you for your participation in the BEP. We welcome your participation and wish you continued success.

Sincerely,



Carlos Gutiérrez  
Certification Manager  
Business Enterprise Program

## Appendix B: Project Team Resumes

### MONICA SANTANA ROSEN

<b>Education</b>		
2002 - 2004	<b>HARVARD BUSINESS SCHOOL</b> <b>MASTER IN BUSINESS ADMINISTRATION, JUNE 2004. AWARDED THE PAUL AND DAISY SOROS FELLOWSHIP FOR NEW AMERICANS AND THE HORACE W. GOLDSMITH FELLOWSHIP FOR OUTSTANDING CONTRIBUTIONS IN THE NON-PROFIT SECTOR.</b>	<b>BOSTON, MA</b>
1993 - 1997	<b>WESLEYAN UNIVERSITY MIDDLETOWN, CT BACHELOR OF ARTS DEGREE IN PSYCHOLOGY. AWARDED THE JOSE GOMEZ IBANEZ SCHOLARSHIP FOR ACADEMIC ACHIEVEMENT, RECOGNIZED FOR EXCEPTIONAL COMMUNITY INVOLVEMENT. SEMESTER ABROAD IN PARIS, FRANCE.</b>	
<b>Experience</b>		
2016 - Present	<b>ALMA ADVISORY GROUP, LLC (ALMA)</b> <b>Chief Executive Officer</b> Launched a human capital consulting firm with the mission of short- and long-term organizational success through the cultivation of people, practice, culture and research. Alma has 9 employees and senior associates supporting states, districts, and nonprofits in the design and implementation of large-scale human capital reforms, with an emphasis on strengthening teachers and principals who improve outcomes for their students.	<b>CHICAGO, IL</b>
2011 - 2016	<b>CROSS &amp; JOFTUS, LLC</b> <b>Partner and Vice President</b> Launched and built a successful human capital and educator effectiveness practice serving urban school districts, states, and charter management organizations nationally. Work included HR assessment and redesign, principal pipeline strategy development and implementation, teacher recruitment, screening and retention strategy development. Client results have included 28% improvement in diversity of teacher hires, improved principal satisfaction with teacher and principal hiring, improved transparency in principal pipeline, and improved satisfaction with HR service.	<b>CHICAGO, IL</b>
2004 - 2011	<b>CHICAGO PUBLIC SCHOOLS</b>	<b>CHICAGO, IL</b>
2008 - 2011	<b>Talent Management Officer</b> Led efforts to identify, recruit, develop and retain school and central office leadership. Responsible for \$14 million budget and \$4 million in federal and private funding partnerships. Raised an additional \$1.2 million in grants. <ul style="list-style-type: none"> <li>▸ Spearheaded job analysis of the principal role and redesigned existing principal screening process.</li> <li>▸ Developed and implemented new strategy for principal recruitment and placement, resulting in historic 400% growth in experienced external hires and the selection of 62 new high potential principal hires.</li> <li>▸ Supported Chief Area Officers (i.e., principal supervisors) through principal talent management efforts, resulting in strategic support and/or exiting of persistently low-performing school leaders.</li> <li>▸ Expanded strategy for new principal induction, revising induction curriculum, executive coaching and peer learning.</li> <li>▸ Directed effort within Central Office to identify high performers and design new succession planning process.</li> </ul> <b>Officer, Human Resources Employee Services</b>	
2004 - 2008	Selected for Broad Residency in Urban Education. Promoted within the first year to establish and run HR Employee Services, a shared service center with 65 staff and \$4.4 million budget. Raised \$5.5 million for HR redesign. <ul style="list-style-type: none"> <li>▸ Improved performance across all areas including salary change processing from 8 weeks to 3 days, call answer rates from 45% to 93%, first call/visit resolution from 45% to 75%, and medical leaves processing from 15-3 days.</li> <li>▸ Designed department and set strategic priorities. Established team scorecard and critical success factors.</li> <li>▸ Launched customer service initiative. As a result, HR was named most-improved department by 60% of principals.</li> <li>▸ Supported HR organization redesign, coordinated change management efforts and PeopleSoft HR implementation.</li> </ul>	
Summer 2003	<b>INQUILINOS BORIQUAS EN ACCION (IBA)</b> <b>Summer Associate, Catalyst Alliance (Partnered with Accenture)</b> Consultant to this Community Development Corporation offering broad services to 900 units of low-income housing. <ul style="list-style-type: none"> <li>▸ Facilitated planning sessions and completed organizational assessment. Developed five-year plan with budget and outcomes. Work resulted in \$3 million capital campaign, expansion goals and 3-year expected milestones.</li> </ul>	<b>BOSTON, MA</b>
1998 - 2002	<b>MANAGEMENT LEADERSHIP FOR TOMORROW</b>	<b>NEW YORK, NY</b>
1999 - 2002	<b>Executive Director</b> Directed all finances, operations and program development for this nonprofit program offering mentorship, career guidance and MBA application assistance to minority undergraduates and professionals. Raised over \$2.7 million. <ul style="list-style-type: none"> <li>▸ Initiated a five-year strategic plan. Engaged the Boston Consulting Group to provide approximately \$1 million in pro-bono strategic consulting. Strategic plan resulted in new program design and improved organization brand.</li> </ul>	

- › Managed operational budget which grew from \$250,000 to \$1.2 million. Established national headquarters, developed compensation and benefits structure and team of seven to create strategic partnerships.

1998 - 1999 **Program Manager**

- Spearheaded assessment and redesign of mentor program. Directed communications including website launch.

1997 - 1998 **TIGER FOUNDATION**

NEW YORK, NY

**Grants Administrator**

Administered \$5 million in grants per year for this private foundation.

- Evaluated and screened funding proposals, recommended initiatives for funding to senior management team.

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**Sylvia M. Flowers**

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**EDUCATION**

**University of Virginia, Darden Graduate School of Business Administration, Charlottesville, VA**

Master of Business Administration

**University of Missouri, Columbia, MO**

Bachelor of Science in Chemical Engineering

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**EXPERIENCE**

**Tennessee Department of Education**

**May 2012 to June 2019**

**Executive Director, Educator Effectiveness and Talent, Nashville, TN**

- Managed a team of 15 in implementing the state's educator evaluation system for teachers and school leaders, ensuring data quality, accuracy and reporting, and developing policy recommendations to improve the system.
- Led the development of district human capital data reports using educator evaluation data and provided training to district leadership teams in order to drive improvement in students' access to effective teachers.
- Created state policy for educator compensation and differentiated pay and ensured implementation in 146 districts statewide.
- Identified and shared best practices, developed tools and resources for improving teacher and leader recruitment, selection and staffing practices in districts and schools across the state, including the launch of a statewide marketplace to match teacher and leader candidates with job openings across the state.
- Developed and implemented district technical assistance and supports for recruiting high-caliber teachers to the profession.
- Oversaw and managed the statewide programs to recognize and reward excellent teachers and leaders throughout the state.
- Directed and coordinated the implementation of two federal grants focused on performance-based compensation – Teacher Incentive Fund (TIF) and Race to the Top (RTTT).

**Tennessee SCORE, State Collaborative on Reforming Education**

**February 2010 – May 2012**

**Director, Technical Assistance, Nashville, TN**

- Provided project management support and oversaw business operations and finances for SCORE's internal operations.
- Provided technical assistance, research and analysis on teacher evaluation systems, including student achievement growth as a component of a teacher effectiveness rating system.
- Led and managed the research and creation of new proposals for new public-private partnerships for SCORE to undertake in conjunction with partner organizations.
- Coordinated and convened focus groups and partner meetings with key stakeholders to gain feedback on the progress of Tennessee's education reform efforts and to refine strategies to support stakeholders' concerns.

**Chicago Public Schools**

**January 2007 –**

**March 2009**

**Project Manager, Chicago TAP (formerly Recognizing Excellence in Academic Leadership), Chicago, IL**

- Oversaw the implementation and administration of the \$27.5MM TIF grant award, the largest competitive federal grant award received by Chicago Public Schools, a pilot for teacher and principal performance based compensation.
- Directed the strategic planning, school selection, staff selection and supervision, establishment of critical procedures, budget management, and communications for the program.
- Managed the critical relationship between the Chicago Teachers Union and Chicago Public Schools in supporting the pilot, which included negotiating the Memorandum of Understanding between the two parties and leading a joint committee responsible for governance and oversight of the project.
- Supervised the Training/Support team and implementation of the Teacher Advancement Program in 20 participating schools.
- Organized and coordinated the professional development for the Chicago TAP Schools' Leadership Teams including three weeks during the summer and monthly principal and lead teacher trainings during the School Year.

**Christina School District**

**July 2004 – January 2007**

**Manager, Grants, Wilmington, DE**

- Oversaw the development of the Consolidated Grant Application and the implementation of plans and requirements of the Grant (\$11.7MM) as well as other multi-site and single site grants.
- Managed the Supplemental Educational Services program for Title I Schools Under Improvement.
- Coordinated the implementation of the Title I programs by working collaboratively with the Title I building principals, parents, and teachers and staff of the Title I Schools.
- Provided technical assistance to and ensured requirements of the NCLB Act were met for schools under improvement, parent involvement, non-public schools, and homeless students.

**Director, Training and Development, Wilmington, DE**

- Organized and coordinated the professional development activities for the District including 10 District-wide In-service days per year and other offerings held throughout the School Year.
- Developed and organized leadership training for over 100 members of the District Leadership Team consisting of Leadership Styles training, 360° Feedback, Malcolm Baldrige Quality, and case studies.
- Facilitated district project focused on developing, documenting, and instituting processes and procedures for all important activities in several departments, such as Human Resources, Payroll, Business Office, Procurement, Facilities, and Curriculum & Instruction.
- Led cross-functional team in the identification, selection, purchase and implementation of a Professional Development registration and tracking system and managed the integration of data from legacy system.
- Managed the site based coaching system consisting of 26 Instructional Coaches located in 24 schools focused on New Teacher Mentoring/Induction, coaching and training teachers, providing workshops, developing curriculum, and improving the quality of teaching in the core content areas.
- Supported the Curriculum and Instruction department by conducting district-wide walkthroughs to assess the implementation of professional development initiatives and provided in-depth technical support to the School Improvement Planning process by serving as school liaison from the district office.
- Selected from over 300 applicants for The Broad Residency in Urban Education, an intensive leadership development program focused on building leadership and management capacity in urban school systems and charter management organizations nationwide.

**Duke Energy**

**July 2002 – July 2004**

**Commercial Associate, Houston, TX**

- Developed financial models using discounted cash flow and EBITDA multiples for acquisition targets in the gas pipeline industry of up to \$35MM.
- Performed valuation analysis on Duke Energy International (“DEI”) assets to identify divestiture candidates and to establish retention values of those assets.
- Drafted, reviewed, and edited Information Memorandums and Sale and Purchase Agreements for the sale of non-strategic assets in DEI.
- Developed the 2003 budget of approximately \$6.0M for Energy Services Finance and Strategic Planning
- Coordinated activities relating to Duke Houston’s participation in the Disclosure Working Group of the Committee of Chief Risk Officers (“CCRO”), a coalition of energy companies formulating best practices in risk management and disclosure for the industry.

**Solutia Incorporated**

**August 1996 – August 2000**

*A \$3 Billion chemical company spun off from Monsanto Company in 1997.*

**Senior Buyer, Essential Materials, Pensacola, FL**

- Managed inventories of more than 200 raw materials and scheduled deliveries for two Solutia nylon plants and seven outsourced manufacturing partners.
- Led cross-functional team to reduce working capital by \$1MM and consolidate precious metal catalyst purchases resulting in \$50 K savings and material handling process improvements.
- Developed and implemented procedures, trained 30 employees, coordinated and conducted audits in order to maintain ISO9002/QS9000 quality systems registration for Purchasing & Manufacturing Services.

**Packaging Engineer and Buyer, Pensacola, FL**

- Managed packaging inventories of more than 100 materials and scheduled deliveries.
- Leveraged and consolidated enterprise packaging purchases as a member of national sourcing teams resulting in enterprise savings of \$2 MM and plant wide savings of \$400 K.
- Identified and evaluated new ways of packaging and handling all finished goods to reduce packaging costs and meet customer needs.

**Monsanto Company**

**August 1994 – August 1996**

**Business & Research Support Services/Engineering Purchasing, St. Louis, MO**

- Conducted study to identify potential suppliers for EDI/EFT resulting in a reduction of manual transactions and the addition of 50% of suppliers to Electronic Data Interchange.
- Negotiated contracts for services to identify potential cost savings and consolidate supplier base.
- Created performance evaluation tool to identify and maintain high performing suppliers and eliminate low performing suppliers.

**OTHER**

- **Founding Board Member, Valor Collegiate Academy, Nashville, Tennessee**

- **Board Member, Education Pioneers, Nashville, Tennessee**
- **Alumni Advisory Board Member, The Broad Center, Los Angeles, California, 2013-2017**

**Deirdre Hargrove -Krieghoff**  
**HUMAN RESOURCE MANAGEMENT EXECUTIVE**

<p><b>Education</b></p> <ul style="list-style-type: none"> <li>❖ MBA University Wisconsin Madison</li> <li>❖ BA Management &amp; Communications Concordia University</li> </ul>	<p><b>Career Summary</b></p> <p>Enthusiastic, goal oriented and results-driven executive who, through 25 years of progressive leadership experience, has developed exceptional organizational, communication, and problem-solving skills. A management executive who has a proven track record of working with diverse team members to capture innovative solutions to complex problems. assessing environments and redesigning operations to align with the mission and strategy of the organization. Skilled at transforming teams and operations to leverage, engage and retain top talent. Essential qualifications include, DE&amp;I, leadership and strategy development, coaching, employee engagement, performance assessment, change management and transformation.</p>
<p><b>Key Skills</b></p> <ul style="list-style-type: none"> <li>❖ Diversity &amp; Equity</li> <li>❖ Leadership Development</li> <li>❖ Team Building</li> <li>❖ Coaching</li> <li>❖ Customer Service</li> <li>❖ Performance Excellence</li> <li>❖ Process Improvement</li> </ul>	<p><b>Experience</b></p> <p><b>Madison Metropolitan School District</b> Madison Wisconsin 9/2014- June 2022</p> <p><b>Senior Executive Director - Workforce Strategy, Development &amp; Operational Efficiency – 8/2021 – 6/2022</b> Responsible for leading the design and implementation of workforce and organizational development of the operations functions of the organization. This position coaches and advises the Chief of Operations on the process of continuous assessment, planning, implementation, and evaluation of current operations strategies, with the goal of transferring knowledge, improving staff capacity, and leading and managing change. Serve as a senior advisor and coach for the Operations Leadership team, assisting with the growth, development, and ongoing improved performance of the team, while promoting workplace excellence with a focus on equity, inclusion, and anti-racism.</p> <p><b>Chief of HR – 7/2017-8/2021</b> Responsible for developing and executing a human resource strategy in support of the overall district plan and strategic direction, specifically in the areas of succession planning, talent acquisition, management, change management, organizational and performance management, training and development, and compensation. The CHR provides strategic leadership by articulating HR needs and plans to the executive management team and the board of education. This position provides management and oversight of five divisions that include: Equity and Engagement, Employment, Benefits, Employee/Labor Relations and Payroll. The five divisions provide quality and timely service to all customers with integrity, fairness, sensitivity, and reliability.</p> <p><b>Hiring</b></p> <ul style="list-style-type: none"> <li>✓ 30% increase in staff diversity of Human Resources department</li> <li>✓ 3 % increase in Teacher Diversity from 12% to 15%</li> <li>✓ 7% increase in Administrator diversity from 20% to 27%</li> </ul> <p><b>Compensation</b></p> <ul style="list-style-type: none"> <li>✓ Improved compensation for Educator and Trades groups to support retention.</li> </ul>

- ✓ Launched Benefits Help Desk, Learning Management and Applicant Tracking systems

**Diversity/Equity**

- ✓ Launched Teachers of Color Advisory and Affinity Groups
- ✓ Revised policy language to ensure retention of diverse staff

**Executive Director of HR – 9/2014 – 7/2017**

Responsible for developing and implementing a proactive human resources strategy to ensure that the District can recruit, develop, and retain top talent. The ED of HR provides management and oversight to four divisions that include: Employment, Benefits, Labor Relations and Payroll. All four divisions provide quality and timely service to all customers with integrity, fairness, sensitivity, and reliability.

**Hiring**

- ✓ Redesigned Teacher screening and selection process – improved time to fill (reduced by 4 weeks) and quality of applicants
- ✓ Launched staff wellness program

**Process Improvement**

- ✓ Redesigned HR staff roles to align to district strategy
- ✓ Transitioned district from collective bargaining agreements to a handbook

**Urban League of Greater Madison**

Madison Wisconsin 2/2013- 9/2014

**Vice President of Workforce Development, Inclusion & Retention**

Responsible for leadership, management, and supervision of the Workforce Development Department. Oversight and guidance of initiatives that advance employment, equity, inclusion, and retention of diverse talent in workplaces operating within the Urban League's service territory.

**Recruitment**

- ✓ 50% increase in client exposure to employment opportunities in service area

**Program Development**

- ✓ Assessed plan to improve and expand services for clients served, including launch of Job Ready Initiative to East HS students and MMSD dis-enrolled students

**Process Improvement**

- ✓ Assessed and improved service delivery model for trainings

**St. Mary's Hospital**

Madison, Wisconsin 1997 – 2/2013

**Department Director**

Responsible for leadership, development, operations, and customer service of select hospital departments. Member of hospital leadership team tapped to provide input determining operational and strategic direction.

**Leadership Development**

- ✓ Assessed, evaluated, planned, and facilitated improved staff competence and performance through ongoing coaching and training. 35% of direct reports coached and transitioned into leadership or other positions within the organization





# Najjah Sion Thompson

## PROFESSIONAL SUMMARY

Knowledgeable Recruiter with history of staffing teams with high-quality diverse candidates. Identifies top sourcing and recruitment strategies meet company needs. Skilled at managing communications, relationships, and all facets of the hiring process.

## SKILLS

- Recruitment Strategies
- Marketing & Sales
- Interviewing Techniques
- Full Cycle Recruiting
- Candidate Pipeline Management
- Applicant Tracking Systems

## WORK HISTORY

**TALENT ACQUISITION ASSOCIATE** *05/2022 to present*

**Alma Advisory Group | Chicago, IL.**

- Develop, plan, and execute national recruitment strategies for Alma searches that attract diverse top talent that meet clients' desired competencies and requisite experiences
- Design and manage effective advertising outreach strategies to market open positions through social media, key job boards, and other channels demonstrated to produce strong candidate pools
- Create campaigns to source leads and prospects and cultivate relationships with key partners to create a diverse candidate pipeline

**RECRUITER** *02/2022 to 05/2022*

**Exact Sciences Corporation | Madison, WI.**

- Assist Hiring Managers to build, gain buy in, and deploy sourcing and talent acquisition strategies for current and future opportunities
- Manage a range of 10-12 requisitions to support our clinical studies, regulatory affairs, finance, and human resources departments
- Develop and maintain external relationships with passive candidates and educational institutions

**RECRUITMENT & ENGAGEMENT SPECIALIST** *03/2019 to 02/2022*

**Madison Metropolitan School District | Madison, WI.**

- Develop a comprehensive Recruitment & Engagement strategy in attracting, sourcing, selecting, and engaging high performing talent
- Support hiring authorities to accomplish their specific hiring objectives for instructional and non-instructional positions
- Leverage social media platforms and online job boards to advertise open positions and engage with potential candidates
- DEI focused strategy that increased New Hires of Color from 15% to 27%

	○	<b>ARTS EDUCATION SPECIALIST</b>	<i>09/2018 to 03/2019</i>
		<b>Madison Metropolitan School District   Madison, WI.</b>	
		<ul style="list-style-type: none"> <li>• Lead district-wide Professional Development for K-12 music teachers on culturally responsive pedagogy that promotes deeper learning for all students</li> <li>• Coach novice teachers on improvement plans towards effective curriculum and instruction experiences</li> <li>• Leveraged budget and educational designs to facilitate development of cost-effective educational programs.</li> </ul>	
	○	<b>MUSIC TEACHER</b>	<i>09/2016 to 06/2018</i>
		<b>Chicago Public Schools   Chicago, IL</b>	
		<ul style="list-style-type: none"> <li>• Design a comprehensive PreK-12th grade IB music curriculum that guides students in the discovery and understanding of music through performance, composition, critical thinking, and analysis</li> <li>• Awarded \$500,000 grant to create a new music production and technology program</li> <li>• Teach secondary performing ensembles: Marching Band, Concert Band, and Drumline.</li> </ul>	
<b>EDUCATION</b>	○	<b>Master of Science   Learning &amp; Organizational Change</b>	<i>expected 2024</i>
		<b>Northwestern University, Evanston, IL</b>	
	○	<b>Master of Arts   Music Performance</b>	<i>2015</i>
		<b>University of Miami, Miami, FL</b>	
	○	<b>Bachelor of Arts   Music Education &amp; Music Performance</b>	<i>2013</i>
		<b>University of Miami, Miami, FL</b>	

**NITA LOSOPONKUL MBA, SHRM-SCP**

Experienced talent acquisition, talent management and program management professional who is passionate about creating talent development programs, building capacity, increasing employee engagement and collaborating in hybrid work environments. I lead with empathy to connect team members, including non-traditional backgrounds and military-to-civilian transitions, with opportunities by listening and learning about their motivations and career goals.

**PROFESSIONAL EXPERIENCE**

**Capital One** *Senior Manager, Customer Experience*

Plano, TX  
(remote)  
05/21 - Present

- Developing customer listening programs to generate insights used to initiate programmatic changes
- Authored strategic plan to resolve service issues to continuously improve customer experience; piloted new process with Mid-Atlantic region earning rave reviews and requests to roll out in additional regions
- Created three supplemental new employee onboarding modules to close gaps in new hire experiences

**Yates+Partners** *Senior Partner*

Bangkok, TH  
(remote)  
11/18 – 05/21

Direct report to the CEO for industry-leading hospitality consultancy. Provide oversight for all the firm's projects to maximize ROI and ensure high quality deliverables. Sample engagements include:

- *Airline Passenger Experience Association (APEX) – World Class Awards*
  - Member of the global team that designed the inaugural World Class Award audit, incorporating key measures in sustainability, safety & well-being, and service & inclusiveness
- *Delta Airlines – Purser Transformation Project*
  - Surpassed YOY Net Promoter Score (2019) goal by 400% by empowering Inflight Leaders to advocate for customers and to shift from being compliance-driven to customer-focused through a series of training initiatives
  - Managed 10-person global content development team to plan training curriculum, design e-learning storyboards and create facilitator guides, presentations and training activities for workshops to retrain all 3,400 Inflight Leaders; overhauled new selection and onboarding programs to align with the new responsibilities and expectations
  - Designed and delivered train-the-trainer program to upskill airline trainers to facilitate new workshops, allowing airline to cost effectively implement change; prepared 50+ supervisors to coach Inflight Leaders in their roles
  - Supported executive team with communications rollout to all 90,000 employees by drafting scripts for CEO's and Inflight Services SVP's video pieces about the transformation
- *Saudia Airlines – Ground Operations Revitalization Project*
  - Redesigned customer experience at world's worst ranked airport through ground service delivery improvements and new training programs for all staff, aligned with client strategy; awarded 2021 5-Star rating by APEX
  - Worked with executive management to ensure equal numbers of males and females were hired for the new customer-facing Airport Ambassador role (% female employees has been historically low)

**Public Impact** *Vice President of District Support Services and Consulting Manager*

Chapel Hill, NC  
(remote)  
01/14 – 08/18

Oversaw multiple K-12 education talent management projects simultaneously to improve compensation and retention of high-performing teachers and build leadership capacity. Mentored junior team members. Sample projects include:

- *Syracuse City School District* – Increased number of low-performing schools participating in school turnaround redesign by 275% while maintaining support from nearly 90% of school staff
- *Office of the Maricopa County School Superintendent* – Developed and delivered train-the-trainer workshops to enable client to cost-efficiently scale program offerings to more schools post-Teacher Incentive Fund (TIF) grant expiration; 83% of pilot schools exceeded student growth expectations
- *Chan-Zuckerberg Initiative / Clayton Christensen Institute* – Awarded grant to research how innovative models combined with blended learning can accelerate student achievement gains. Conducted observations and interviews, analyzed data; published case studies and a white paper on best practices
- *Texas Education Agency* – Created competency-mapped selection processes to support HR teams in minimizing bias in screening and hiring talent for innovative new teacher-leader roles at six Texas districts
- *Fulton County Schools* – Provided individualized coaching sessions to school principals and district leaders to diagnose issues through root cause analyses and accelerate student academic growth results
- *American Institutes for Research* – Served on the peer review panel reviewing Every Student Succeeds Act (ESSA) state plans; provided targeted recommendations for improvement

**NITA LOSOPONKUL MBA, SHRM-SCP**

**Washoe County School District** *Director of Talent Acquisition and Development*

Reno, NV  
08/10 – 12/13

- Supervised a team of 10 responsible for talent recruitment and selection for all district openings
- Oversaw expansion of Work Study, AmeriCorps Vista, AARP and Community Work Experience Program partnerships to provide on-the-job training and employment opportunities for participants
- Worked closely with hiring managers to provide a strong and diverse candidate pool in a cost-effective and timely manner, including pre-screening, skills demonstration and behavior-event interviews (BEI)
- Built university talent pipelines and comprehensive student teaching and field experience programs to facilitate early identification of high-potential future teachers and secure talent early in hard-to-fill areas
- Expanded on-campus recruiting to include Historically Black Colleges and Universities (HBCUs) and Hispanic Serving Institutes (HSIs) to improve diversity outreach efforts
- Launched the Spanish Teacher Exchange (J1 visa) to support the scaling of dual language programs
- Liaised with the Dept of Ed to support Alternative Route to Licensure candidates to complete requirements
- Administered Grow Your Own scholarship program to support classified staff seeking to become teachers
- Redesigned HR procedures, within district policies, to improve process times & decrease costs by 65%

*Director of Innovation*

- Successfully launched 10 High School Signature (Magnet) Academies to provide new learning opportunities for students; partnered with higher education institutions, local businesses (including Microsoft), and non-profits to develop rigorous and engaging curriculum maps; oversaw student application and selection processes to ensure inclusion of students previously excluded from special programming
- Fiscally responsible for a \$5M capital improvement budget, \$500K operating budget, \$400K grant budget

*Special Projects Manager*

- Completed benchmarking of staffing ratios with districts nationwide; Built and tested new models to equitably distribute school headcount and repurpose \$2M for new programs to close achievement gaps

**Chevron Corporation**  
Northern California | Singapore  
08/07 – 07/10

*Global Marketing Graduate Rotational Program*

- Represented rotational program at on-campus and diversity conference recruiting events
- Led 12 pioneering ExtraMile (EM) convenience store projects including interior construction and merchandising; coached new franchisees in brand execution and business planning
- Oversaw retail stations and convenience stores; managed 45 staff, including hiring, payroll, performance evaluations, and customer service focused training
- Launched one new and two rebranded fuel products; led staff training to explain changes to full-service Singapore market (four official languages); exceeded sales targets by 9%
- Headed product selection, pricing, placement and promotional activity, and vendor contract negotiation for beverage products at all 500+ stores, comprising \$100M in annual sales
- Created marketing guide to support the EM brand with easy-to-use, customizable tactics to increase foot traffic, attract new customers, reward loyal customers, and increase overall sales

**McMaster-Carr Supply Co**  
Santa Fe Springs, CA  
06/01 – 09/06

*Product Dept. Supervisor | Sales Dept. Supervisor | Sales Development Associate*

- Interviewed and onboarded new associates; supervised and continuously developed a team of 10 Product Specialists; coached, evaluated and administered merit increases for a team of 25 representatives in a call center environment
- Implemented weekly performance reviews that reduced order entry errors by 50%

**EDUCATION**

**The Broad Center (now Yale School of Management)**

Master of Education, Education Leadership, 2012

**UCLA Anderson School of Management**

Master of Business Administration, 2007

**California Institute of Technology**

Bachelor of Science, Engineering, 2001

**ADDITIONAL**

*Certifications:* Society of Human Resources Management Senior Certified Professional, Project Management Professional, Diversity and Inclusion in HR Management, Sustainable Management, Six Sigma Green Belt

*Community:* UCLA Anderson Admissions Committee Member, Earthwatch Institute Volunteer, Family Resource Center Advisory Board Member, Kiva Loan Editor, Food Bank Volunteer, Nevada/Frisco Humane Society Foster Kitten Mom

*Consulting:*

- Veritas Prep – Coach non-traditional candidates and those with perceived deficiencies in their pursuit of an MBA
- Alma Advisory Group – Source and recruit a diverse pool of talent for K-12 education and non-profit leadership roles

# Sidney Kabotie

As a multi-cultural Native American, my identity exists within the liminal spaces between social/political/cultural positionalities. Through a lifetime of intersectional experiences, I have developed exceptional skills and unique insights for maneuvering through complex constellations of engagement and have become deeply committed to advocating for social justice in all environments I am in.

## Education

### Tufts University, Medford, MA- *Master of Arts in Diversity & Inclusion Leadership*

August 2019 - Spring 2021 (Graduated May 23<sup>rd</sup>)

Graduate degree in cross-disciplinary program that blends courses in: Urban & Environmental Policy and Planning, Psychology, Child Studies and Human Development, Education

### Fort Lewis College, Durango, CO- *Bachelor of Arts in Anthropology*

January 2014 - December 2018

Focus on socio-cultural anthropology. Developed a special interest in archaeology and the ethical concerns regarding excavation in the southwest and its effects on Indigenous communities. Extracurricular activities included involvement with student group “Pueblo Alliance”, as a member and president. As president, met with Tribal leaders alongside faculty in NAGPRA repatriation negotiations.

## Experience

### Indigenous Collaboration Inc., Denver, CO – *Assistant Facilitator*

May 2013 – January 2021 (currently employed)

Trained ToP (Technology of Participation) Methods facilitator- leading stakeholders through a series of workshops designed to enable highly energized, productive, inclusive and meaningful participation in consensus-based group decision-making. Work exclusively with Tribal peoples (e.g. Tribal government, non-profit organizations, community organizers, resource developers, educators, philanthropists, students)

### Southern Ute Cultural Center – *Director Assistant*

June 2019 - August 2019

Worked closely with Director of Southern Ute Cultural Center. Responsibilities included cleaning museum cases, storing artifacts appropriately, and attend southwest archaeology conferences to inform curators and archaeologists about the intricacies and importance of Tribal involvement in their NAGPRA compliance.

## Relevant Courses

### Graduate Classes – *Tufts University*

#### Federal Indian Policy

Survey policies and laws that reflect the historically inequitable and contentious relationship between American Indians and the United States government. This course focuses on the powers and jurisdictions of local, county, state, federal, and Tribal governments and their relationships to one another.

#### Developing Sustainable Communities

Focuses on: improving our quality of life and wellbeing; meeting the needs of both present and future generations (intra-generational and intergenerational equity); justice and equity in terms of recognition, process, procedure, and outcome; living within ecosystem limits (also called ‘one planet living’).

## SKILLS

Responsive Leadership

Perceptive Communication Firmness of Purpose

Intercultural Fluency

Conceptual Thinking

TOP Facilitation methods

Charismatic Oration

## Clubs and Organizations

NAGPRA Committee – Assist in the repatriation effort of Indigenous skeletal remains and funerary collections held by Fort Lewis College.

Pueblo Alliance – A registered student organization at Fort Lewis committed to cultivating and celebrating pueblo identity on campus.

## PROJECTS

### Undergraduate Senior Seminar –

Explored the origins and limits of the pan-indigenous identity, calcified through collective Native resistance efforts against oppressive policies and marginal mainstream education about the diverse spectrum of Native American peoples

#### Leadership and Organizational Change

Studying key concepts and strategies for participating effectively in organizations, especially mission-driven organizations dedicated to policy, planning, and other social change efforts. We explored how organizations mobilize people and sustain their efforts to impact complex social, environmental, and urban problems with particular attention to diversity and inclusion goals.

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## **Undergraduate Classes — Fort Lewis College**

### Contemporary Issues of Native Nations

Addressed how treaty rights have been recognized, utilized, and undermined in the United States. We discussed important events within Native American history that have given way to the American Indian Movement and the evolution of protests such as Wounded Knee, Alcatraz and the Dakota Access Pipeline.

### Legal and Ethical Issues

Looked at and discussed the tensions between Tribes and archaeologists who seek to excavate sites that are held sacred to indigenous peoples. Our discussions involved appropriate consultation with tribes and the legal procedures necessary for a developer to move forward on a project involving indigenous land and historical sites.

### Native American Spirituality and Religion

Provides an historical and contemporary basis of indigenous philosophies and worldviews; how they are expressed in various societal contexts and how they have both changed and remained consistent from time immemorial to the present day. Ethical practices and questions related to both Native American religions and efforts to suppress those religions are also the focus of the course.

V E N U S V E L E Z

**QUALIFICATIONS**

- Over 20 years of experience in the education space.
- Management, operations, talent recruitment, program design and evaluation, student advisement, community engagement, and staff development experience.
- Strong project management skills; detail-oriented, objective-driven.
- Excellent oral and written communication skills.
- Ability to work independently or with a multi-disciplinary team.
- Graduate degree in Business.

**EXPERIENCE AND SKILLS:**

**TALENT MANAGEMENT AND ADMINISTRATION**

- Hired, trained, and directly supervised teams ranging from 2 to 8 full-time staff.
- Managed hiring and placement of regional and central staff in the parent engagement division of the NYC Department of Education.
- Provided ongoing professional development and technical assistance citywide to school-based Parent Coordinators and regional parent staff at the NYC Department of Education.
- Assisted in the development of performance assessment tools; coordinated and oversaw performance assessments for school-based, regional, and central parent staff.
- Managed a \$1.2M budget.

**PROGRAM MANAGEMENT AND PLANNING**

- Launched several new program ideas from concept to successful implementation, including: parent involvement programs, two grant programs, and a translation certificate program for school-based and regional parent staff at the NYC Department of Education.
- Served on Board/Management Committee driving 5-year strategic planning process.

**EVENT PLANNING AND COMMUNITY ORGANIZING**

- Organized and managed various citywide conferences, training programs, and events for the NYC Department of Education.
- Launched a citywide professional development event for Parent Coordinators attended by close to 1000 participants, as well as notable guest speakers, including Mayor Bloomberg and Chancellor Klein.

**GROUP FACILITATION AND TRAINING**

- Facilitated professional development sessions, retreats, and informational meetings for Parent Coordinators and regional parent staff at the NYC Department of Education.
- Facilitated student and parent engagement meetings throughout New York City as part of Chancellor Klein's Children First campaign for education reform in NYC public schools.
- Prepared and facilitated youth development and college preparation workshops.

**EMPLOYMENT HISTORY**

8/2005 – Present

**Entrepreneur, COO/Project Leader – Spalding Smart Shot**

Partnered with inventor of an innovative sports product to develop the product and bring it to market. Drove the project from idea inception through launch (Dec. 2016). Conducted research, created business plan and marketing materials, vetted and built a project team including lawyers, engineers, and manufacturers, identified and sought opportunities for product exposure, and helped negotiate a licensing contract with a top sports company. Continue to support product marketing and sales.

1/12-5/15, 3/18-present

**Independent Consultant**

Worked to support district level education reform efforts throughout the country, primarily in the area of talent management and human resources, as well as executive level searches. District projects have included: supporting the redesign of the human resource department and talent management systems for Newark Public Schools and Syracuse City School District; screening applicants for leadership development academies at Gwinnett County Public Schools; and, supporting sourcing, recruitment, and screening process for executive level positions at Tulsa Public Schools, Foundation Academies charter school organization, Civic Builders, and Baltimore City Schools.

1/14-6/14

**New York Edge (formerly Sports & Arts in Schools Foundation), New York, NY**

Consultant, High School Programs

Assisted Deputy Director in program evaluation; advised on improvement plans and supported implementation. Provided coaching and support to high school program staff, and worked on special projects as assigned.

1/08-3/11

**ASPIRA of New York inc., New York, NY**

P/T Consultant, College Preparation Program

Designed and supported the implementation of a high school college preparation program. Helped train College Coaches on helping students build college readiness skills and advising students on the college admissions process. Oversaw ongoing program assessment, development, and reporting.

3/05 – 7/06

**NYC Department of Education (DOE), New York, NY**

Director of Regional Support

Worked with regional parent support teams to implement parent initiatives set out by the Chancellor. Provided professional development and technical assistance to regional parent staff and school-based Parent Coordinators. Managed parent involvement data and assisted in producing citywide reports. Assisted with content development for parent pages on the DOE website. Organized and managed various citywide conferences, programs, and events. Managed hiring process and placement of regional and central parent staff. Served as point of contact for human resource and union contract issues for parent staff. Served as liaison to various departments and assisted with parent outreach efforts.

3/04 – 3/05

Director of Parent Support

Provided direct service to New York City public school parents citywide; assisted in addressing parent concerns and questions and provided information to help parents better navigate the Department of Education. Supervised parent engagement staff and provided professional development and support to volunteer parent leaders citywide.

7/03 –3/04

Supervisor of Parent Support, Region 8

Helped create and open a new Parent Support Office in the new regional structure under the Chancellor's Children First Education Reforms. Under former Superintendent Carmen Farina, oversaw direct service to parents in Region 8 (former community districts 13, 14, 15, and 16), which consists of 139 schools. Managed a staff of 8 Parent Support Officers. Provided professional development and support to school-based Parent Coordinators and parent leaders in the region.

9/02 –6/03

**Consultant**

Facilitated workshops for students and parents on the college and financial aid process. Facilitated student and parent engagement meetings for the Chancellor's office. Helped support the successful opening of 4 new small college preparatory high schools in Brooklyn; assisted with community outreach, student recruitment, staff development in the area of family engagement, and provided general support to school teams.

**Additional Prior Roles**

6/97 - 7/02

**Harlem Educational Activities Fund, New York, NY**

Director of High School and College Programs

9/96-5/97

**Albert G. Oliver Program, New York, NY**

Director of Student Programs/Acting Deputy Director

**EDUCATION**

**Zicklin School of Business, Baruch College, New York, NY**

**Master of Business Administration, January 2003**

**Concentration: Marketing Management**

**Columbia University, Teacher's College, New York, NY**

**Educational Policy Fellowship Program, September 1999 - June 2000**

**Marymount Manhattan College, New York, NY**

**Certificate in Non-Profit Management, January 1996 - December 1998**

**Wesleyan University, Middletown, CT**

**Bachelor of Arts, May 1991**

**Major: Government**





# **CHARLOTTE-MECKLENBURG BOARD OF EDUCATION**

**Charlotte-Mecklenburg Government Center  
600 East Fourth Street, 5<sup>th</sup> Floor  
Charlotte, NC 28202**

## **REQUEST FOR PROPOSAL SERVICES FOR A SUPERINTENDENT SEARCH PARTNER**

January 13, 2023

## I. INTRODUCTION

### 1.1 WHAT WE ARE LOOKING FOR

The Charlotte-Mecklenburg Board of Education ("Board" or "CMS") is requesting informal proposals ("RFP") from qualified firms or individual consultants interested in providing Executive Search Consultant Services for the position of Superintendent for CMS to express their interest by responding to this RFP.

This RFP is open to any service provider who would like to respond, and the Board encourages participation from minority-owned, women-owned, and veteran-owned businesses. It is not the intention of this RFP to put this service out for bid. The objective of this RFP is to select a search firm to assist the Board and facilitate the search process for a new Superintendent.

### 1.2 BACKGROUND

The Charlotte-Mecklenburg Board of Education is seeking a new Superintendent to implement solutions to accelerate student achievement, engage families and the community in student success, and continue to address the challenges to learning presented by the global pandemic. Charlotte-Mecklenburg Schools educates more than 141,000 students in 181 schools working with more than 18,000 staff members. CMS is proud of its diverse mix of students who represent 184 countries and speak 204 languages and dialects. Our student population is primarily 35.9% Black, 29.6% Hispanic or Latino, 24% white, and 7% Asian.

The Board seeks an experienced Superintendent who is familiar with our schools' successes and challenges. The Superintendent must have a strong belief in the innate talent of every student and demonstrate an unrelenting pursuit in closing opportunity and achievement gaps that exist between students. The successful candidate must be committed to uplifting student voice, bringing families into decision-making, and supporting teachers, educators, and all school staff in the success of our students. The Board seeks a candidate who has a solid foundation in instruction and how students learn, as well as a belief that learning does not happen in a vacuum and is most effective when students feel supported and have access to services that prioritize their physical and mental health. Candidates must have demonstrated experience improving outcomes and closing opportunity gaps for students of color, multi-lingual learners, students with disabilities, and students of diverse socio-economic backgrounds. The Board operates under a [Student Outcomes Focused Governance](#) framework.

The Charlotte-Mecklenburg School system is governed by a nine-member school board, comprised of six district members and three at-large members, who serve four-year staggered terms. The Board is charged with hiring, supervising, and evaluating the Superintendent. The Board is also the corporate policy-making body for the district, and the Superintendent and staff provide the leadership to cause Board policies to be implemented. The Superintendent, as the Board's chief executive officer, is responsible for ensuring that academic and business operations are being carried out in accordance with the lawful rules of the Board as either set forth by Board action or in Board policy. The Superintendent is also responsible for accomplishing reasonable interpretation of the Board's goals within the boundaries provided by the Board's guardrails, Board policy, State, and Federal law. The Superintendent is obligated to implement the school district's policies and budget. Therefore, it is essential the Superintendent demonstrates: a) educational leadership; b) administrative and leadership skills; and c) the ability to communicate and interface effectively with the community and its institutions. A specific job description will be developed by the Search Committee and selected search firm.

### 1.3 COMMUNITY ENGAGEMENT

Community Engagement is key to the success of our school system. This superintendent search process began in the fall of 2022 with Community Engagement, which included listening sessions, stakeholder interviews, and online surveys. Although these community engagement efforts were thorough and the feedback aligned with the Board’s vision and values, additional Community Engagement by the selected search firm will be needed to ensure community input is representative of all geographic, demographic, and socio-economic groups in our county. This may require targeted survey collections and a final public engagement session(s) as deemed necessary by the Search Committee. All completed community engagement information is available at <https://charmeckschools.org/superintendentsearch>.

### 1.4 TIMELINE

The Search Committee intends to work with urgency to appoint a Superintendent by April/May 2023. This search will be conducted at an accelerated pace given the competitive marketplace for superintendents. We are looking for a search partner that can deliver excellent services to enable the Board to attract strong, innovative candidates for this position. Interested firms or individuals must be willing to commit the necessary staff resources to accommodate our appointment timeline.

The table below shows the preliminary timeline. Dates are subject to change by the Search Committee. Any changes will be posted at <https://charmeckschools.org/superintendentsearch>. The deadline for responding to this RFP is **Thursday, February 2, 2023**.

* Week Starting	Board	Action	Milestone	Date	Time	Location
1/2/2023	Jan 4 - Committee Meeting	Create and Approve Timeline and Review and Revise RFP	Search Kickoff	1/4/2023	11:00 AM	CMGC
1/9/2023	Jan 10 - Board Meeting	BOE Approves Timeline & RFP Process		1/10/2023	6:00 PM	CMGC
	Jan 10 - Committee Meeting	Finalize RFP		1/10/2023	Post Board	CMGC
	Jan 13 - RFP Goes Live	RFP Goes Live & Press Release	RFP Live			
1/14/2023		RFP live				
1/23/2023	Jan 25 - Committee Meeting	RFP live		1/25/2023	9:00 AM	CMGC
1/30/2023	Committee Meeting	Committee Search Firm Evaluation				
	Feb 2 - RFP Closed		RFP Closed			
2/4/2023	Committee Meeting	Committee Search Firm Selection & Finalize Contract				
	Board Meeting	BOE Approves Search Firm Contract	Search Firm Selected			
2/13/2023	Board Meeting	Search Firm / Board Working Sessions				
2/20/2023		Search Firm launches Search	Launch Search			
2/27/2023		Search Firm Recruiting				
3/4/2023	Committee Meeting	Search Firm Recruiting				
3/13/2023	March 17 - Applicant Deadline	Search Firm Application Deadline & Committee Evaluation	Application Deadline			
3/20/2023	Committee Meeting	Committee Narrow Finalists	Select Finalists			
3/27/2023	Small Group/Individual	Finalists: Candidate Interviews & Evaluation				
4/3/2023	Board Meeting	Meet to Select Superintendent	Select Superintendent			
4/10/2023		Contract Negotiations & Transition Planning	Spring Break			
4/17/2023		Transition Planning				
4/24/2023	April 25 - Board Meeting	Approve Contract, Effective Start Date and Transition Plan	Superintendent Hire Approved	4/25/2023	6:00 PM	CMGC

## **II. SCOPE OF WORK**

Services expected from the search partner include:

- 1) Assisting the Search Committee in conducting a search that generates a diverse pool of highly qualified candidates, including women and people of color.
- 2) Identifying, conducting background checks for, vetting, and soliciting applications from superior candidates locally and nationally.
- 3) Maintaining communication with candidates and responding to certain candidate inquiries and information requests.
- 4) Screening the initial applicant pool and providing a report on each applicant, using criteria developed in partnership with the Search Committee.
- 5) Sourcing and recommending candidates with whom the Search Committee will conduct interviews.
- 6) Conducting reference and background checks on all interviewees, as required, including more extensive reference checks on the finalists.
- 7) Providing timely advice and direct assistance to the Search Committee on the overall conduct of the search, including the interview process.
- 8) Assisting the Search Committee in coordinating candidate interviews and making necessary arrangements for candidate travel and accommodations.
- 9) Performing other related services in the conduct of the search.
- 10) In addition to delivering effective, transparent, and expert-level advice and assistance to the Search Committee, the ideal search partner will think creatively about candidate recruitment. A suitable candidate pool will provide opportunities for the Search Committee to assess a range of candidates who could lead the transformative agenda for CMS to improve student experiences, accelerate outcomes, close opportunity gaps, and increase instructional quality and rigor across the district.

## **III. PROPOSAL FORMAT**

Your proposal consists of every element of your response to this RFP.

Your technical proposal must include the following six things:

- (3.1) provide an introduction;
- (3.2) propose your approach for this project;
- (3.3) share your background and qualifications;
- (3.4) describe your team;
- (3.5) provide three references; and
- (3.6) outline pricing structure.

### 3.1 INTRODUCTION AND EXECUTIVE SUMMARY

On the cover or first page of your proposal, please provide contact information, including name, title, address, email, and phone number.

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.

### 3.2 APPROACH TO SCOPE OF WORK

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 above 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.

### 3.3 SERVICE PROVIDER BACKGROUND AND COMPANY QUALIFICATIONS

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. CMS reserves the right to request a copy of your firm's audited financial statements, including a detailed balance sheet and profit and loss statement for three years, or similar financial reports, to evaluate the financial strength of your company.

Specifically, this should include:

- 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, and a brief description of the processes executed during each search, and 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?

5) List any current legal claims, whether officially filed or not, pending against your firm in the last 5 years.

6) How do you manage candidate confidentiality on a search such as this?

### 3.4 STAFFING AND KEY STAFF QUALIFICATIONS

Describe your team that would work on this project. Include a list with each team member, a summary of relevant credentials and experience, and an indication of proposed time commitment for each staff member. Make the case for why each team member will be great partners on this project.

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.

### 3.5 REFERENCES AND ADDITIONAL INFORMATION

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.

### 3.6 PRICING PROPOSAL

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.

Understanding the level of effort and cost for each deliverable will help us better understand the structure of the proposed work.

Please note:

- All prices are inclusive of travel. No additional charges, including travel lodging, food, miscellaneous expenses and any other expenses will be allowed.
- Any travel, accommodation, or other costs related to having applicants meet in person will be reimbursed to the search firm. These costs do not need to be included as part of the pricing proposal.
- The total cost that is quoted in your response to this RFP will be considered a best and final offer.
- You will bear the onus of any errors made in pricing the services (e.g., omitting a component of the services).
- Any cost incurred in preparing or submitting information in response to this RFP is your firm's sole responsibility; the Board will not reimburse for RFP preparation, travel, or lodging expenses incurred.

**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:** Monica Santana Rosen 

**Company:** Alma Advisory Group

**Date:** January 31, 2023

**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.