INVITATION LETTER

September 12, 2016

Re: Request for Statement of Qualifications for Executive Search Firm Superintendent Search for San Francisco Unified School District

Dear Prospective Firms:

You are invited to submit a proposal, in accordance with the attached Request for Statement of Qualifications, to the San Francisco Unified School District to perform Executive Search Consultant Services for the position of Superintendent of Schools.

The Request for Statement of Qualifications (RFQ) is available at the following web address:


Interested firms are invited to submit proposals, in the format provided, by Friday, September 30, 2016.

All questions must be submitted electronically to Danielle Houck at daniellehouck@sfusd.edu by Monday, September 19, 2016. Answers will be answered in writing by Friday, September 23, 2016.

Very truly yours,

Brenda Arzate
SUPERINTENDENT SEARCH FOR

SAN FRANCISCO UNIFIED SCHOOL DISTRICT

Request for Statement of Qualifications for Executive Search Firm

Deadline: September 30, 2016
SUPERINTENDENT SEARCH FOR
SAN FRANCISCO UNIFIED SCHOOL DISTRICT

REQUEST FOR STATEMENT OF QUALIFICATIONS FOR
EXECUTIVE SEARCH FIRM

The San Francisco Unified School District (the “District”) hereby requests proposals from qualified firms to provide Executive Search Consultant Services for the position of Superintendent of Schools. To ensure that the Board of Education of the District (the “Board”) obtains the most qualified firm that can most effectively deliver the required services, the Board requests informal proposals as set forth below.

Interested firms are invited to submit one original signed proposal and thirteen (13) hard copies. The proposal shall be made in the format provided and the complete proposal, together with any and all additional materials, shall be enclosed in a sealed envelope addressed and delivered no later than 5:00p.m. on Friday, September 30th, 2016, to the following address:

San Francisco Unified School District
Legal Department
555 Franklin Street, 3rd Floor
San Francisco, California 94102

All questions concerning this Request must be sent in writing to Danielle Houck at DanielleHouck@sfusd.edu.

Proposers are not to contact District staff (except Danielle Houck) or members of the Board about this Request or the selection process. Any Proposers who violate this request will be disqualified from further consideration.

**Schedule Key-Dates**
*Please note: the Board reserves the right to revise or extend these dates as necessary. If the Board cancels or revises any part of this Request, all respondents will be notified by addenda.*

1. Request Distributed
   - September 12, 2016
2. Vendor Questions Due
   - September 19, 2016
3. Questions Answered in Writing
   - September 23, 2016
4. Responses Due by 5:00pm
   - September 30, 2016
5. Interviews by the Board
   - October 6, 2016
6. Finalist Selected
   - October 11, 2016
I. **SCOPE OF SERVICES**

The responsibilities of the selected firm will include the following:

1. Conduct all aspects of the recruitment process as directed by the Board.
2. Review position requirements and interview, survey and conduct focus groups to solicit opinions from Board members, District staff, elected officials and various District stakeholders to help define the leadership attributes and leadership profile needed in a superintendent. Develop and implement a plan to provide and facilitate community input and engagement regarding desired superintendent skills, characteristics, and qualifications.
3. Work with staff and the Board to develop a plan and timeline for search that includes community involvement while balancing the need for confidentiality of applicants.
4. Meet with the Board and with individual Board members to assess Board priorities, goals, and objectives in order to assist the Board in determining and articulating criteria and qualifications necessary for selecting a Superintendent of Schools.
5. Assist the Board in conducting a search that generates a diversified pool of highly qualified candidates, including women and people of color.
6. Prepare and distribute materials (i.e. leadership profile, survey results) as necessary to advertise the position.
7. Assist the Board in developing an appropriate compensation package for the Superintendent that facilitates a successful recruitment effort.
8. Identify and solicit applications from superior candidates statewide and nationally.
9. Maintain communication with candidates and respond to candidate inquiries and information requests, as appropriate.
10. Screen, evaluate and rank qualified applicants and provide a report on each applicant, using criteria established by the Board.
11. Conduct reference and background checks on all interviewees, as required, including extensive reference checks on three to six finalists.
12. Provide advice and assistance to the Board in the overall conduct of the search, including coordinating and facilitating the interview process and making necessary arrangements for candidate travel and accommodations.
13. Maintain strict confidentiality throughout the search process as directed by the Board.
14. Assist the Board in developing a transition plan for the new Superintendent.
15. Perform other related services and assistance in the conduct of the search.
II. SUBMISSION GUIDELINES

Each proposal must include at least the following information:

1. A summary of the firm’s experience in conducting executive searches for superintendent of schools for urban PreK-12 school districts.

2. A list of recent assignments in education and/or related fields, including the names of client institutions and the titles of positions for which searches were conducted.

3. The names, addresses, and telephone numbers of at least three individuals who may be contacted to comment on the firm’s performance in recent searches for superintendent of schools for urban K-12 school districts. Please note if the firm has experience in conducting searches for superintendent of schools for urban school districts which also serve PreK students.

4. Evidence of commitment to, and successful experience in recruiting outstanding candidates who are both from culturally diverse backgrounds and who possess experience working with culturally diverse communities.

5. Evidence of commitment to, and successful experience in developing and implementing a plan to provide and facilitate community input and engagement regarding desired superintendent skills, characteristics, and qualifications.

6. The name of each staff member who will be assigned to this search, a brief summary of his/her relevant credentials and experience, and an indication of the proposed time commitment to this project. Please identify the lead staff person and provide contact information.

7. The proposed fee structure for this search, including one or more options depending on the specific nature of the final assignment.

III. GENERAL INFORMATION ABOUT THE DISTRICT

District Profile

The San Francisco Unified School District (SFUSD) is the seventh largest school district in California, serving more than 57,000 students who speak more than 44 documented languages across 132 schools in the city and county of San Francisco every year. We aim for every student who attends SFUSD schools to discover his or her spark, along with a strong sense of self and purpose, and that all students graduate from high school ready for college and career, and equipped with the skills, capacities and dispositions outlined in SFUSD’s Graduate Profile. Every day in our quest to achieve this mission we provide each and every student the quality instruction and equitable support required to thrive in the 21st century.

District’s Mission Statement

Every day we provide each and every student the quality instruction and equitable support required to thrive in the 21st century.
District’s Universal Goals

Access and Equity
Make social justice a reality by ensuring every student has access to high-quality teaching and learning.

Student Achievement
Create learning environments in all SFUSD schools that foster highly engaged and joyful learners and that support every student reaching his or her potential.

Accountability
Keep district promises to students and families and enlist everyone in the community to join in doing so.

District’s Core Beliefs

- The achievement gap is the greatest civil rights issue facing SFUSD.
- It is possible to increase academic achievement of high-performing students and accelerate achievement of those currently less academically successful.
- Quality schools offer engaging and challenging programs, caring and committed staff, strong and visible leaders, and instruction differentiated to meet each child’s needs.
- Authentic partnerships are essential to achieving our vision for student success.
- Equity is the work of eliminating oppression, ending biases and ensuring equally high outcomes for all participants through the creation of multicultural, multilingual, multiethnic, and multiracial practices and conditions; as well as removing the predictability of success or failure that currently correlates with any social or cultural factor.

District’s Core Values

1. Student-centered - We put students' needs first.
2. Fearless - We persist through challenges.
3. United - We celebrate and build on each other's strengths.
4. Social justice - We stand with those most vulnerable in our community.
5. Diversity-driven - We respect and seek to understand each person.
**District’s Theory of Action**

If we...
- Engage our students to learn via a rigorous Common Core-based curriculum in a safe and supportive classroom environment;
- Invest in building and developing the capacity of teachers, leaders and school staff;
- Enlist our partners and empower families in a community schools approach;
- And coherently align supports and resources to execute our strategies in action at all levels of the organization (classroom, school and central office, along with supportive policy and governance);

Then, every student who enrolls in our schools will graduate prepared to succeed in college, career and life.

This is our theory of action—the actions we believe are our greatest levers to ensure our overall vision of graduating every student ready for college, career and life comes true.

**District’s Vision of Student Success**

Every student who attends SFUSD schools will discover his or her spark, along with a strong sense of self and purpose. Each and every student will graduate from high school ready for college and career and equipped with the skills, capacities and dispositions outlined in SFUSD’s Graduate Profile.

**District’s Graduate Profile**

We want our graduates to be ready to transform the world. As our Vision for Student Success states, we want our students to graduate from our schools with the skills, capacities and dispositions for 21st century success. We are committed to supporting every student to develop strong academic knowledge and skills, as well as a host of dispositions and behaviors, that increase their curiosity and engagement, activate their full potential for learning and prepare them for life, work, and study beyond their secondary school years.

- Content Knowledge- Ready to Think, Learn and Grow
- Creativity- Ready to Create
- Career and Life Skills- Ready for Career, Ready for Life
- Global, Local and Digital Identity- Ready to Tackle a Changing World
- Leadership, Empathy, and Collaboration- Ready to Lead, Ready to Work with Others
- Sense of Purpose and Sense of Self- Ready to Be Their Best

Superintendent Position

The Superintendent is the executive for the District and the County Office of Education in all matters relating to the powers and duties of the District.

The District is governed by the Board. The Board of Education is charged with hiring, supervising, evaluating, and paying the superintendent as well as approving the Superintendent’s recommendations for appointments and promotions for all school system positions. The Board also has the authority to develop educational, personnel, managerial, and financial policies for the District and to adopt balanced operating and capital budgets annually.

The Superintendent has the obligation to implement the policies and budget of the school district.

It is essential that the Superintendent demonstrate: (1) educational leadership with a commitment to equity; (2) administrative and leadership skills; and (3) the ability to communicate and interface effectively with the culturally and socio-economically diverse San Francisco community and its institutions. A specific job description will be developed.

IV. EXECUTIVE SEARCH FIRM QUALIFICATIONS

The selected firm must have recent experience (in the past 18 months) in conducting a successful search (selection of a candidate and acceptance of a position, as facilitated by your firm) for a Superintendent of Schools for an urban PreK-12 school district with at least 20,000 students. If a firm does not have such experience or does not submit information in the proposal regarding this qualification, the District reserves the right to deem the proposal non-responsive and may be eliminated from further consideration.

Provide a list of at least five (5) searches conducted for school districts or county offices of education and include the average length of time the candidates remained on the jobs. The reference list should include:

1. Client name, contact person, and current telephone number;
2. Description of services provided;
3. Budget performance;
4. Schedule performance;
5. Key personnel involved; and, as noted above,
6. Length of time the successful candidates remained employed.
V. EVALUATION CRITERIA

The determination of those firms that are qualified, interested, and available and the Board's choice of the best qualified will be based on the following criteria:

1. The search firm’s proposed approach to the work and how it meets the Board’s needs.
2. Qualifications and experience relevant to the scope of work including specific experience recruiting and placing superintendents of school districts of similar size, including the experience of the team assigned to the San Francisco search.
3. Past performance as determined by recent and relevant contracts. The evaluation will be based on information obtained from references provided by the firm as well as other relevant past performance information obtained from other sources known to the Board.
4. Fee structure.

VI. FORMAT FOR RESPONSES

In addition to the content detailed in Section II, each response shall answer the following legal questions:

(1) Has the firm or any of its principals been in litigation or arbitration involving executive search services for any public, private or charter K-12 schools during the prior five (5) years? If the response to this question is yes, provide the name of the school district and briefly detail the dispute.

(2) Has the firm ever had a contract terminated for convenience or default in the prior five years? If the answer to this question is yes, provide details including the name of the other party.

(3) Has the firm, its owner(s), and/or principal(s), partner(s) or manager(s) involved in or aware of any pending litigation regarding professional misconduct, bad faith, discrimination, or sexual harassment? If the answer to this question is yes, provide details.

(4) Is the firm, its owner(s), and/or principal(s) or partner(s) involved in or aware of any pending disciplinary action and/or investigation conducted by any local, state or federal agency? If the answer to this question is yes, provide details.

VII. PROCESS FOR SELECTING FIRM

Board leadership will review each firm’s qualifications to determine which are most highly qualified to perform the required work. An interview will be conducted with the highest ranked consultants. Rankings will be made by the District following evaluation and scoring of the proposals.

Those firms invited to interviews will be notified of the dates and times of their interviews. The key proposed project staff will be expected to attend the interview. The interview will start with an opportunity for the firm to present its proposal and its project team. The interview will be an opportunity for the Board to review the proposal, the firm’s history,
and other matters the Board deems relevant to selecting the firm. The Board may inquire as to the firm’s suggested approaches to the projects and the issues identified in this Request.

A final determination/award will be made on October 25, 2016. The General Counsel’s Office will notify selected firms as to place, date, and time of the interview. Firms that have not been selected shall be so notified in writing after the conclusion of the selection process.

VIII. GENERAL TERMS AND CONDITIONS

The following terms and conditions apply to agreements between the District and the successful firm.

A. Non-Discrimination (Required by SFUSD Board Policies 0410 and 6141)

1. The Firm understands and agrees that in providing services to the District, it is the Firm’s obligation to comply with Board Policy 0410, which requires that all District programs, activities, and practices be free from discrimination based on race, color, ancestry, national origin, ethnic group identification, age, religion, marital or parental status, physical or mental disability, sex, sexual orientation, gender, gender identity or expression, or genetic information; the perception of one or more of such characteristics; or association with a person or group with one or more of these actual or perceived characteristics.

2. The Firm hereby represents and affirms that it is the Firm’s policy that its programs, activities, and practices are free from discrimination based on race, color, ancestry, national origin, ethnic group identification, age, religion, marital or parental status, physical or mental disability, sex, sexual orientation, gender, gender identity or expression, or genetic information; the perception of one or more of such characteristics; or association with a person or group with one or more of these actual or perceived characteristics.

3. The Firm agrees that it will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, ancestry, national origin, ethnic group identification, age, religion, marital or parental status, physical or mental disability, sex, sexual orientation, gender, gender identity or expression, or genetic information; the perception of one or more of such characteristics; or association with a person or group with one or more of these actual or perceived characteristics.

B. Prohibited Interests

No officer, employee or agent of the District who is authorized in such capacity and on behalf of District to negotiate, make, accept, or approve, or to take part in negotiating, making, accepting or approving any agreement, shall become directly or indirectly interested financially in a contract between the Firm and the District or in any part thereof. No officer, employee, or
attorney of or for District who is authorized in such capacity and on behalf of District to exercise any executive, supervisory or other similar functions shall become directly or indirectly interested financially in a contract between the District and the Firm or in any part thereof.

Proposer shall receive no compensation and shall repay District for any compensation received by the Firm from the District as a result of the Firm’s proposal, should Proposer aid, abet or knowingly participate in violation of this Article.

C. Insurance

1. The Firm shall maintain insurance in the following minimum amounts:
   a. Commercial General Liability Insurance with limits not less than $1,000,000 (one million dollars) each occurrence Combined Single Limit for Bodily Injury and Property Damage.
   b. Workers’ Compensation Insurance, with Employer’s Liability limits not less than $1,000,000 (one million dollars) each accident.
   c. Professional Liability (E & O) Insurance with limits not less than $2,000,000.00 (two million dollars) each occurrence and in the aggregate. Coverage must at a minimum apply to negligent Errors and Omissions arising out of professional services, performed under the contract, with any deductible not to exceed $100,000 each claim.

2. Commercial General Liability policy must provide the following:
   a. Name as Additional Insured the San Francisco Unified School District, its Board, officers and employees.
   b. That such policy is primary insurance to any other insurance available to the Additional Insured, with respect to any claims arising out of a contract between the District and the Firm and that such policies apply separately to each insured against who claim is made or suit is brought.

3. If any policies are written on a claims-made form, the Firm agrees to maintain such insurance continuously in effect for three years following completion of the agreement or extend the period for reporting claims for three years following the completion of the agreement, such that occurrences which take place during the agreement period shall be insured for three years following completion of the agreement.

4. The Firm shall provide the District with the appropriate certificate(s) of insurance prior to commencing performance. The Firm shall also be obligated to notify the District in writing at least 30 (thirty) days in advance of any cancellation, non-renewal or reduction of any of its insurance policies required under the contract. The Firm also understands and agrees that the District may withhold payment for services performed for any violations of the insurance provisions of the agreement.
D. Invoices and Payments

Unless specified otherwise, the Firm shall render invoices for services performed under the contract to the District’s Legal Department. Invoices shall be submitted in a timely manner.

E. Miscellaneous

This solicitation shall not be construed in any manner to be an obligation by the District to enter into an agreement with any vendor. The Board reserves the right to reject or accept any or all proposals based on criteria established at its sole discretion and may negotiate the terms of the contract with the selected vendor prior to entering into a contract.

The Board further reserves the right to revise in part this Request. If the Board cancels or revises this Request, all respondents will be notified by addenda. The Board also reserves the right to extend the date responses are due. Statements of interest and any other information submitted in response to this Request shall become the property of the Board. Notwithstanding any indication by Responder of confidential contents, and with the exception of bona fide confidential information, contents of responses are public documents subject to disclosure under the California Public Records Act after award.

The Board will not provide compensation to Responders for any expenses incurred by Responders for response preparation or for any demonstration that may be made. Responders submit responses at their own risk and expense.