



F.A.M.E., Inc.

CEO Search Committee Meeting

Date and Time

Wednesday March 17, 2021 at 5:30 PM CDT

Location

Topic: CEO Search Committee Meeting

Time: Mar 17, 2021 05:30 PM Central Time (US and Canada)

Join Zoom Meeting

<https://zoom.us/j/95828707054?pwd=T0ZocGRmbIVUTDI6ZG8wOUxTN1pZZz09>

Meeting ID: 958 2870 7054

Passcode: 386558

One tap mobile

+19294362866,,95828707054#,,,,*386558# US (New York)

+13017158592,,95828707054#,,,,*386558# US (Washington DC)

Agenda

I. Opening Items

- A. Call the Meeting to Order
- B. Record Attendance

II. Review of Search Firms

The committee will review proposals submitted by search firms.

A. Discussion of Search Firm Proposals

The committee will define the criteria by which to evaluate each proposal before moving to evaluate each proposal and creating a recommendation of the proposal to accept. The committee will then discuss potential search firms and the pros and cons of their proposals.

B. Vote on Search Firm Proposals

The committee will conduct a vote to determine which proposal will be recommended to the full board for acceptance to conduct the CEO Search for Audubon Schools.

III. Next Steps

A. Next Steps (Action Item)

The chairperson will entertain motions regarding the next steps in the CEO Search Process. If no motions are made, the chairperson will lead a discussion of logistical next steps in the process.

B. Next Steps: Administrative Directions

The committee will provide next steps to the administration regarding how to proceed with the CEO Search Next Steps.

IV. Closing Items

A. Adjourn Meeting

Coversheet

Discussion of Search Firm Proposals

Section:	II. Review of Search Firms
Item:	A. Discussion of Search Firm Proposals
Purpose:	Discuss
Submitted by:	
Related Material:	Educators Collaborative.docx Educational Directions-Audubon Schools.pdf



Educators' Collaborative LLC

AN EDUCATIONAL SEARCH & CONSULTING FIRM

Positioning schools for success through effective leadership

March 11, 2021

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Evan D. Peterson

Ms. Letoye Brown

**Audubon Charter
Schools New Orleans,
LA**

Dear Ms. Brown,

Nebo, N.C. 817-307-3832

epeterson@educatorscollaborative.com

Mary Seppala

West Stockbridge, MA • 610-772-7625 mseppala@educatorscollaborative.com

Thank you for the opportunity to present this proposal for the upcoming CFO search for Audubon Charter Schools.

Educators' Collaborative, one of the first established search firms in the US, is comprised of twelve partners, located throughout the US and Central America. As a senior partner, I will be the lead consultant in this

search but assure you that every search has the benefit of all partners in developing a candidate pool.

I am particularly excited about this opportunity as I believe I understand the roles and responsibilities of a CEO having been a public- school superintendent in Massachusetts, the Head of School at a large international school in Europe, and head of an independent school in the Philadelphia area. I have also conducted 12 Montessori searches in the past few years. I know and understand schools and am committed to conducting a transparent search where all constituent groups in your community feel represented and included.

If you choose to work with Educators' Collaborative, and with me, I am prepared to begin immediately. It is critical that I understand as much as possible about your school community in order to focus on recruiting candidates who are truly a fit in terms of experience, leadership style, and personal attributes. There are many great school leaders, but not every great leader is right for every school.

Understanding your school community may begin as an exploration of the current status, both challenges and opportunities. I would like to immediately reach out to all community members with a survey that provides an initial glimpse into how the schools are perceived by parents, faculty and staff and what is important in terms of new leadership.

www.EducatorsCollaborative.com

The Process: While Educators' Collaborative adapts the search process to fit the unique character of each school and its respective search timetable, it is useful to outline the typical process. We will:

- Identify the role of the Search Committee
- Post the position – Educators' Collaborative website, NAIS, Blue Sheet, SAIS, NAES, LinkedIn, Diversity Inc., email blast to over 2,500 schools and potential candidates, etc.
- Prepare the *Information for Candidates* report, our primary recruiting document.
- Develop, with the Search Committee a leadership profile.
- Develop a plan of action and timetable to fit your desire for an accelerated search process.
- Actively recruit and screen candidates.
- Manage all communications between the candidates and the Search Committee.
- Draft any communications (announcement letters, periodic updates, etc.) to the school community.
- Manage, with the Search Committee, all interviews and campus visits and schedule all candidate interviews.
- Strategize with you a competitive and appropriate compensation package for the candidate of choice.
- Communicate key decisions to candidates.
- Assist, as requested, with the introduction of the new CEO and the transition phase.

Most importantly, I will work directly with the Search Committee throughout the search process, being readily available to provide guidance and counsel at all the critical decision points and when challenging decisions arise, as they invariably do. Of particular note is my commitment to work with you through the transition months and the new CEO's first year. I aspire to do more than just help Audubon Charter Schools identify its new CEO; I also want to offer our support to assure that the new CEO's tenure gets off to the best possible start.

For these consulting services, I propose a search fee of \$40,000.00, plus reimbursement for reasonable out-of-pocket expenses, including travel, lodging, and advertising costs. To avoid any appearance of conflict of interest in assisting you with developing the right compensation package for the CEO-elect, EC charges a flat fee rather than a percentage of compensation.

The search for new school leadership is at once both daunting and exciting. If it is thoughtfully organized and well led, it will result in the Audubon Charter School community being unified around a CEO who knows the challenges and can provide strong leadership during a rewarding and lengthy tenure.

I look forward to the opportunity to further discuss these services

with you. Sincerely,

Mary Seppala, Partner



Educators' Collaborative LLC

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Mary F. Seppala • 516 Biscayne Drive, West Palm Beach, FL • 610-772-7625 • mseppala@educatorscollaborative.com

Mary F. Seppala, Ed.D, Partner



EDUCATION

University of Massachusetts, Ed.D., Student Development
Massachusetts College of Liberal Arts, M.A. Counseling
Massachusetts College of Liberal Arts, B.S. Education

PROFESSIONAL EXPERIENCE

NEASC/CIE Commissioner, 2014-present
The Agnes Irwin School, Bryn Mawr, PA, Head of School, 2009-14
Munich International School, Munich, Germany, Head of School, 2005-09
Lee-Tyringham School District, Lee, MA. Superintendent of Schools, 2002-2005
Amherst-Pelham Regional School District, Amherst MA, District Special Education Administrator, 1985-2002, High School Counselor, 1980-1985
University of Massachusetts, Amherst, MA, Instructor, School of Education, 1996-2000
Department of Defense Overseas Schools, administrator, teacher, Germany, Turkey, Greece, 1974-1978
Central Berkshire Regional District, Dalton, MA, teacher, counselor, 1971-74

PROFESSIONAL AFFILIATIONS

The Head's Network
National Coalition of Girls' Schools
National Association of Independent Schools
Pennsylvania Association of Independent Schools
IBO Regional Advisory Board, Europe, Africa and the Middle East
Association for the Advancement of International Schools
Association of German International Schools, Board Member
The Education Alliance, Brown University
Massachusetts Association of School Superintendents

CLIENTS SERVED (Partial Listing)

Near North Montessori, Chicago	Children's Own School, MA
Springside-Chestnut Hill Academy, PA	Montessori School of Northern Virginia
Visitation School, MN	Falmouth Academy, MA
Hutchison School, TN	Zhenzhou World Academy, China
Gladwyne Montessori School, PA	Shattuck St. Mary's, MN
The Haverford School, PA	Stratton Mt. School VT.
Charles Armstrong School,	The Cobb School, CT
The American Embassy School, Delhi	TASIS American School, London
The Galloway School, GA	Berkshire Country Day School, MA
SSM Lou Fu Mountain, China	Montessori School Raleigh, NC
Montessori Flatiron School, NY	Beacon Academy, IL
Andover School Montessori, MA	Childpeace Montessori School, OR
Miami Country Day School, FL	



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References for Mary F. Seppala

Brian Banigan, Board Chair, Andover School Montessori
brian@banigan.com 617 596 1104

Katie Storey, Search Committee Chair, The Charles Armstrong School,
Belmont, CA katie_crocker@yahoo.com

Sharon Himeno, Search Committee Chair, Hanahau'oli School,
Honolulu, HI shimeno@pohlhawaii.com 808 220 3034

Leigh Thompson, Co-Chair Search Committee, Galloway School,
Atlanta GA. leigh@launchgradconsulting.com 404 219 1727

Mims Maynard Zabriskie, Search Chair, Springside Chestnut Hill
School, Philadelphia, PA mzabriskie@morganlewis.com
215 837 5644

Laura Sachoy, Chair, Falmouth Academy Search Committee,
Falmouth, MA lryansachoy@mac.com 508 758 4687



Educators' Collaborative LLC

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Educators' Collaborative Hallmarks

- **EC is a full-service consulting firm for schools.**
We provide counsel in more areas (searches, strategic planning, admissions, institutional advancement, governance, financial planning, transitions, institutional evaluation/change, and conflict resolution) than most firms, and no firm provides more services than we do.
- **EC creates a search process tailored to each school's unique ethos.**
We develop a flexible search schedule and process reflective of a school's history and tradition and one that recognizes the importance of deadlines in order to remain competitive in the market-place.
- **EC collaborates with client schools to create effective recruiting documents**
Clients and candidates routinely praise our *Information for Candidates* report for providing an informative overview of the school and a comprehensive leadership profile, detailing the school's strengths, the opportunities and challenges it faces, and the qualities and skill set being sought.
- **EC has extensive recruiting sources.**
Aside from the hundreds of school leaders we personally know across the country (and in some cases overseas), and the hundreds of candidates in the firm's database, we have access to dozens of professional associations, colleges and universities for the recruitment of candidates.
- **EC personally and thoroughly vets every candidate.**
In addition to meeting candidates, partners check references; this is not a task entrusted to remote, back office staff. Thus, we present candidates to our clients who are not just qualified to lead a school but instead are fully qualified to meet each school's expectations and needs and who will fit its culture.
- **EC is committed to its' clients.**
As our references will attest, we are readily available for our clients. Working carefully with the Search Committee, we assure that the complexity of the search process is carried out in an effective, inclusive, and thoughtful manner.
- **Every EC team includes at least one exemplary, long tenured, former head of school.**
We have well-developed skills for understanding schools and their dynamics, representing schools to candidates, and recognizing outstanding talent. Our experience in leading schools provides important credibility to the search process and enables us to be an invaluable resource to schools with the variety of issues that inevitably emerge during a leadership change.
- **EC charges a flat fee for search services.**
Because we do not charge a percentage of the appointee's compensation, as do many other firms, our clients are assured there is no conflict of interest facilitating communication between the candidate of choice and the client during compensation negotiations.
- **EC provides distinctive, post search, transition services.**
Our commitment to a school does not end with the announcement of the Head -Elect. We develop a transition plan with our clients to position the school, the Board and the Head-Elect for a long, successful partnership and an effective tenure.



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Transition Planning

As a part of its Search Agreement, Educators' Collaborative consultants provide ideas and leadership for Search Committees in the areas listed below in order to ensure a smooth and effective transition.

Whenever a school welcomes a new Head of School, the dynamics of the relationship between the Head and the Board change, and the potential for missteps increases. We believe that our experience as former Heads of School and as Trustees offers valuable assistance and perspective in enabling all involved to best meet the needs of the school.

Preparing the School for Transition: **The Nuts and Bolts That Will Leave the House in Order**

EC will help identify ways to prepare the Board, administrative team, and school community-at-large for the transition. The recommended tasks range from a comprehensive communication plan to recognizing the importance of a succession plan for the Board.

Following the Appointment of the Head-Elect: **Effective Use of the Months before the New Head of School Arrives**

EC will advise the school on welcoming the new Head of School and making effective use of the period of time between the Head's appointment and the beginning of his/her tenure.

Upon the Arrival of the New Head of School: **Getting Off to a Good Start during the Summer Months**

EC will assist the school in developing a plan to introduce the new Head of School to the school constituencies and community-at-large: Board, faculty, parents, students and community members. The summer months are an ideal time for the new Head to gather information through individual and group gatherings.

On-Going: **Being Attentive to the Challenges Inherent in a Change of Leadership**

EC will reinforce the important role a transition committee plays in fulfilling its responsibility to provide guidance and support for the new Head of School and offer emotional support for the Head and family.



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CLIENTS SERVED SINCE 2010

Completed Head of School Searches

Albuquerque Academy, NM (2020)
 All Saints Episcopal School, AZ (2019)
 Allen Academy, TX (2014)
 American Embassy School, Delhi, India (2017)
 American School of Guatemala (2014)
 The Ancona School, IL (2015)
 Andover School Montessori (2020)
 Annie Wright Schools, WA (2020)
 The Avery Coonley School, IL (2015)
 Baker Demonstration School, IL (2017)
 The Barrie School, MD (2010)
 Beacon Academy, IL (2020)
 Beacon Day School, CA (2014)
 Belmont Day School, MA (2016)
 Berkshire Country Day School (2019)
 Berkwood Hedge School, CA (2012)
 Bertschi School, WA (2016)
 Berwick Academy, ME (2018)
 Blue Oak School, CA (2017)
 The Blue School, NY (2017)
 Boulder Country Day School, CO (2013)
 Breck School, MN (2017)
 The Bridges Academy, NY (2019)
 Brookstone School, GA (2010)
 Brookwood School, MA (2015)
 Brownell Talbott School, NE (2012)
 The Caedmon School, NY (2012)
 Canterbury School, IN (2020)
 Central European Leadership Acad., Slovakia (2015)
 Chadwick School, CA (2019)
 Charles Armstrong School, CA (2015) (2020)
 Charles Wright Academy, WA (2020)
 Chesterfield Day School, MO (2011)
 Childpeace Montessori School, OR (2020)
 Children's Own School, MA (2017)
 Chinese American International School, CA (2010)
 Christ Church Day School, NY (2019)
 Churchill Center and School, MO (2020)
 Cincinnati Country Day School, OH (2015)
 City and Country School, NY (2017)
 The Cobb School Montessori, CT (2019)
 Cold Spring School, CT (2013)
 Colegio Interamericano, Guatemala (2010)
 The College School, MO (2019)
 Columbia Independent School, MO (2013 and 2020)
 Columbus Academy, OH (2013)
 The Common School, MA (2011)
 Community School, MO (2015)
 The Community School of Naples, FL (2013)

The Country School, CT (2011)
 The Craig School, NJ (2013 & 2020)
 Crossroads Academy, NH (2015)
 Cushing Academy, MA (2013)
 Davidson Day School, NC (2020)
 Detroit Country Day School, MI (2020)
 Eagle Hill School, CT (2019)
 East Woods School, NY (2017)
 Echo Horizon School, CA (2014)
 Edmund Burke School, DC (2011)
 The Episcopal School in the City of New York, (2016)
 Explorer West Middle School, WA (2019)
 Falmouth Academy, MA (2014 & 2018)
 Far Hills Country Day School, NJ (2014)
 The Fayetteville Academy, NC (2012)
 Fenwick High School, IN (2010)
 First Presbyterian Church Nursery School, CT (2015)
 Follow the Child Montessori School, NC (2019)
 Foothill Country Day School, CA (2011)
 Fort Bend Christian Academy, TX (2017)
 Foxcroft Academy, ME (2010)
 Friends Academy, MA (2012)
 Friends Academy, NY (2016)
 Friends School, CO (2011)
 Friends School of Minnesota, MN (2018)
 The Galloway School, GA (2018)
 George Stevens Academy, ME (2011)
 Gig Harbor Academy, WA (2020)
 Gladwyne Montessori School, PA (2016)
 Glen Urquhart School, MA (2012)
 Gordon School, RI (2018)
 Greens Farms Academy, CT (2018)
 Hanahau'oli School, HI (2019)
 Harbor Country Day School, NY (2011)
 Harford Day School, MD (2019)
 Hargrave Military Academy, VA (2011)
 The Harvey School, NY (2016)
 Heronfield Academy, NH (2018)
 The Hewitt School, NY (2015)
 Hill-Murray School, MN (2015)
 Holland Hall, OK (2011)
 The Hudson School, NJ (2016)
 Hutchison School, TN (2017)
 IDEAL School and Academy, NY (2016)
 Independent Day School, CT (2013)
 Innovation Academy Charter School, MA (2014)
 The International School of Beijing, China (2010)
 Jackson School, MA (2020)
 Kent Place School, NJ (2017)

Kents Hill School, ME (2011)
 Kew-Forest School, NY (2017)
 Keys School, CA (2013)
 Kimball Union Academy, NH (2019)
 Laguna Blanca School, CA (2010)
 Lake Forest Academy, IL (2019))
 Lake Ridge Academy, OH (2018)
 Lake Tahoe School, NV (2019)
 LaLumiere School, IN (2016)
 Lawrence School, OH (2018)
 Leila Day School, CT (2019)
 Lincoln Academy, ME (2013)
 Long Trail School, VT (2018)
 Lyndon Institute, VT (2014)
 Madison Ave. Presbyt. Church Day School, NY (2015)
 Maine Central Institute, ME, (2013 & 2019)
 Maine School of Science and Mathematics, ME (2019)
 Maple Street School, VT (2019)
 Marshall School, MN (2010 & 2013)
 Mizzentop Day School, NY (2014)
 Montessori Children's House, CA (2015)
 Montessori School of Northern Virginia, VA (2018)
 The Montessori School of Raleigh, NC (2020)
 Munich International School, Germany (2010)
 National Child Research Center, MD (2014)
 Nerinx Hall High School, MO (2013)
 New Roads School, CA (2013)
 New Vista School, CA (2015)
 Newton Montessori School, MA (2012)
 The Nightingale-Bamford School, NY (2012)
 North Shore Country Day School, IL (2016)
 North Yarmouth Academy, ME (2011)
 Oak Meadow Montessori School, MA (2012)
 Oakwood Friends School, NY (2016)
 Old Trail School, OH (2017)
 Open Window School, WA (2012)
 The Orme School, AZ (2014)
 Pembroke Hill School, MO(2019)
 The Pennsylvania School for the Deaf, PA (2013)
 The Phillips Brooks School, CA (2011)
 Pingree School, MA (2010)
 Plymouth Church School, NY (2016)
 Presidio Knolls School, CA (2015)
 Presentation School, CA (2013)
 Principia School, MO (2014)
 The Prospect School at Wooster School, CT (2011)
 Providence Country Day School, RI (2019)
 Putnam Indian Field School, CT (2014)
 The Quaker School at Horsham, PA (2015)
 Quest Academy, IL (2015)
 The Raleigh School, NC (2019)
 Ranney School, NJ (2013)
 Redwood Day School, CA (2011)
 Regis School of the Sacred Heart, TX (2014)
 Resurrection Episcopal Day School, NY (2012)
 Rio Grande School, NM (2019)
 Robert C. Parker School, NY (2017)
 Robert College, Istanbul, Turkey (2011)
 Rodeph Sholom School, NY (2013)
 Rossman School, MO (2018)
 Roycemore School, IL (2013)
 Rumson Country Day School, NJ (2020)
 Rye Presbyterian Nursery School, NY (2016)
 Saint Andrew's Episcopal School, CA (2014)
 St. Anne School, CA (2016)
 St. Edmund's Academy, PA (2014)
 St. Gabriel's Catholic School, TX (2013)
 St. George's Independent School, TN (2015)
 St. Joseph Montessori School, OH (2019)
 St. Luke School, GA (2020)
 St. Luke's Episcopal School, TX (2013)
 St. Mark's Episcopal Day School, FL (2014)
 St. Paul's Episcopal School, CA (2014)
 St. Paul's School, MD (2013)
 St. Regis School, TX (2014)
 St. Stephen's Episcopal School, TX (2018)
 Sandia Preparatory School, NM (2010)
 Sanford School, DE (2011)
 Sant Bani School, NH (2020)
 Science and Arts Academy, IL (2013)
 Seattle School for Boys, WA (2020)
 Shady Side Academy, PA (2010)
 Shore Country Day School, MA (2017)
 Shrewsbury Montessori School, MA (2015 & 2019)
 Smith College Campus School, MA (2016)
 Stanley British Primary School, CO (2020)
 The Speyer Legacy School, NY (2015 & 2019)
 Sophia Academy, RI (2018)
 Springer School and Center, OH (2018)
 Springside Chestnut Hill Academy, PA (2016)
 Stanley Clark School, IN (2010)
 Star Academy, CA (2016)
 State College Friends School, PA (2019)
 Storm King School, NY (2012)
 Stratton Mountain School, VT (2020)
 Summers-Knoll School, MI (2016)
 Summit Charter School, NC (2019)
 Summit Middle Charter School, CO (2012)
 Summit Montessori School, MA (2012)
 Swain School, PA (2020)
 Tatnall School, DE (2014 & 2017)
 Thacher Montessori School, MA (2013)
 Thomas Jefferson Independent Day School, MO (2015)
 Trinity Episcopal School, Austin, TX (2014)
 Trinity Episcopal School, Galveston, TX (2014)
 University School, OH (2019)
 University School of Milwaukee, WI (2011 & 2020)
 Valley School of Ligonier, PA (2008 & 2017)
 Ventana School, CA (2015)
 Villa Maria School, CT (2020)
 The Village School of Naples, FL (2018)
 Virginia Chance, VA (2020)
 Vistamar School, CA (2018)
 Wasatch Academy, UT (2020)
 Washington Episcopal School, MD (2011)
 The Waterford School, UT (2015)
 West Nottingham Academy, MD (2016)
 Westmont Montessori School, NJ (2020)

Wingra School, WI (2016)
Wolcott School, IL (2013)
York School, CA (2019)



February 12, 2021

Mr. Javier Jalice, Board Chair, F.A.M.E. Inc.
Ms. Latoye Brown, CEO
Audubon Schools
428 Broadway Street
New Orleans, LA 70118

Dear Javier and Latoye:

John Watson and I appreciate the informative conversation we had yesterday about the search for a new CEO for the Audubon Schools. We would be delighted to assist you in finding a new leader to carry on the great work, you, Latoye, your Board, faculty and staff have achieved. Our proposal includes information about assisting in the identification of an Interim Head for the 2021-2022 school year and a comprehensive search process to appoint a permanent Head of School for July 1, 2022 and the transition program to follow.

Dr. John Watson and I will serve as the lead consultants for your search and transition. We will handle all aspects of the search while strategically tailoring our process to Audubon School's needs. From what you shared, we realize we will need to expand our normal outreach to charter, Montessori and French immersion school networks. My past work with Mark Elgart, CEO of Cognia, may be very useful for your needs. Over the past three years Dr. Watson has completed twelve searches, nearly half in schools PK-8 schools. We have recently worked together as a team to complete a head of school search for The Discovery School (Prek-18 months-8 Grade) in Jacksonville Beach, Florida.

Attached to this letter is an overview of the Educational Directions executive search practice, an outline of "best practices" at Educational Directions, bios and references, an outline of the scope of service, a possible search calendar and a chart of estimated expenses. During this time of COVID, we will be mindful and respectful of the health protocols in place at Audubon Schools. We will both have received the required COVID vaccinations by late February. We look forward to visiting the Audubon Schools and its community members so we can accurately and enthusiastically present the CEO opportunity to potential candidates.

Thank you for your consideration of Educational Directions.

Sincerely,

A handwritten signature in black ink, appearing to read "Mike Murphy".

Mike Murphy, Partner
mmurphy@edu-directions.com
(727) 409-2330

A handwritten signature in black ink, appearing to read "John Watson".

Dr. John Watson, Partner
jwatson@edu-directions.com
(239) 293-1124



Educational Directions: Executive Search Overview

Educational Directions is a nationally recognized educational consulting firm and an acknowledged leader in retained search for heads of independent schools. Educational Directions (EduDx) has assisted with over 350 successful head of school searches in 40 different states.

EduDx is a national independent school search and consulting firm established in 1986 and based in Portsmouth, Rhode Island. Our independent school clients across America range from the very small to the very large and include boarding and day schools; coed and single sex; elementary, secondary and PK-12; rural, suburban and urban; secular and religious; college preparatory and special purpose.

We remain small by design in order to provide our clients with personal, timely and expert service as we have for over thirty years. Always staying true to our core values, we have attained our reputation for excellent service through exceptional results. Our search professionals/consultants take on fewer searches in order to do them well, with time to get on the phone, get in the car and build strong relationships with candidate prospects.

We understand that your new head of school must be able to deliver a multiple bottom line: enrollment, fundraising, balanced budgets, teaching and learning outcomes, professional development, career advice, parenting advice, and be a trusted advisor to the students, faculty and community.

To target outstanding candidates, we continually build upon:

- ❑ Long-standing relationships with educational leaders throughout the independent school world.
- ❑ A sophisticated, integrated database that gives us instant access to information on all independent schools, their heads, and senior administrators.
- ❑ The ability to customize our recruitment for each client assuring that potential candidates whom others might not have thought about will be invited to examine the opportunity.
- ❑ The only subscription search report in the industry that lists all head of school searches, ***The Blue Sheet***. Through ***The Blue Sheet***, EduDx is able track all head of school searches in the country.

We charge a flat fee plus expenses based on our time expended and the experience we bring to each search. Our fee is not determined by the Head's compensation.

We follow the National Association of Independent Schools' Principles of Good Practice for School Search Committees and Search Consultants. Educational Directions affirms without reservation the principles and laws of equal opportunity in employment. We will not discriminate against qualified candidates for any unlawful reason.



Educational Directions: Executive Search Best Practices

EduDx provides a thorough, well-thought out search process that gives the process depth and that manages stakeholder participation efficiently and constructively. We believe that participation and transparency are critical components to a successful search. However, successful searches can be *both inclusive and discreet*.

Our ability to recruit outstanding candidates, whether or not they are looking, is unsurpassed. We go after those leaders and “rising stars” who best match the profile of the ideal candidate for your school’s distinct culture and specific needs. Deep knowledge of our client is highly influential in building the confidence of candidate prospects. *We look for leaders who have done very good work... but not yet their best work.*

Our search professionals, not “back office” staff, are responsible for every aspect of your search, from the initial school visit and networking calls to the candidate interviews and reference calls. Having experienced the culture of your school and the dynamics of your search committee, we can effectively promote your leadership opportunity, *discern the nuances of fit* of a particular candidate and judge where to delve deeper in reference conversations. Back office staff lack this frontline experience.

EduDx Quick Facts: 2010 to 2020

- ❑ Respected firm with a national presence East to West, North to South
- ❑ Small, highly collaborative firm
- ❑ Intimate knowledge of the Florida independent school landscape
- ❑ Over 140 successful HOS searches
- ❑ 50 HOS searches in EC-8 schools

With *strong emphasis on personal due diligence*, we thoroughly evaluate candidates, ensure that they are well prepared for your search and stay in close touch with them throughout the process.

- ❑ We have multiple conversations, including comprehensive personal, behavioral and competency-based interviews. Whether a partnered or individual consultant search, we collaborate with our colleagues in this most important phase.
- ❑ We arrange third party background checks for all semifinalists.
- ❑ Recorded video interviews of each semifinalist allow the Search Committee to put a face and voice to the paper application materials.
- ❑ We organize a minimum of 12 references checks for each finalist.

Our search professionals work very hard and with increasing success to ensure *a diverse pool of candidates*. We have successfully recruited a wide range of diverse candidates in all our recent searches, and there is a great story behind each of these wonderful candidates.

Finally, a *thoughtful transition* is the key to a long and successful tenure for your new head of school. We assist the search committee and the school community through the entry and transition process and are available throughout the first year, and beyond.



Dr. D. John Watson, Partner



John Watson completed his 15th year as a Head of School in 2017, the last five at Seacrest Country Day School in Naples, Florida. Prior to his appointment at Seacrest in 2012, John served 10 years as Head of School at West Nottingham Academy (MD), founded in 1744.

John holds a bachelor's degree in Music Education from Northern Michigan University, and an MA and PhD in Music Composition and Theory from the University of Minnesota. He began his independent school career at Breck School (MN) as co-chair of the Visual and Performing Arts Department. From 1992-2002 John served as Academic Dean/Assistant Head at Darrow School (NY), Peddie School (NJ) and Cheshire Academy (CT).

John employs a collaborative leadership style that empowers each community to strive for clarity and innovation by engaging faculty, students, parents and trustees in deep, mission-centered exploration of programs and opportunities. John believes that as a head of school, the most important role one fulfills is to help a school to embody its mission. With a leadership transition, change is inevitable, and change driven by mission is most likely to flourish and endure.

John currently serves on the Board of Directors of United Arts Council-Collier County in Naples. John served for six years on the Association of Maryland and DC Independent Schools Board of Directors and was a member of the Accreditation Committee for five years. John and Bonnie Watson are the parents of three children and grandparents of four living in Nashville, Los Angeles and New Zealand. Home base for John is Marco Island, FL.

Michael Murphy, Partner



After 23 years of serving as a Head of School, Mike joined Educational Directions as a partner in July 2020. Mike's commitment to the development of leaders and strengthening schools has resulted in a seamless transition to his work as a search consultant and strategic advisor for trustees and school leaders. A student of leadership, Mike is engaged in a study of aspiring Heads of School and has expanded his professional network with the Association Directors, Chairs of University Programs and Heads of Schools from across the county who mentor and or provide programs for aspiring Heads. Mike has also focused on programs designed for women and people of color.

During his years as a Head, Mike served on the Boards of The Southern Association of Independent Schools(SAIS) ,The Florida Council of Independent School.(FCIS) and AdvancedEd before they became Cognia. Currently, he is a Senior Fellow and Mentor for the Severin Leaderships Group out of Groton, CT. In addition, he volunteers with The Jewish Middle School of Nashville and is guiding the Board and staff through a strategic planning process. Mike recently worked with John Watson on the successful searches at The Discovery School of Jacksonville and Sagemont School in Weston. Florida



References for Dr. John Watson and Michael Murphy as a team

Jennifer Kokabany, Chair, Search Committee, The Discovery School of Jacksonville Beach, FL
(18month Toddler-Grade 8 250 students)
C (904) 477-0724 jkowkabay@thediscoveryschool.org

References for Dr. John Watson

Rev. Mary Conroy, Rector and Head of School Search Committee, St. Philips Episcopal Church and Day School, PK3-5, Co-Ed Episcopal Day School, 190 students
O (305) 444-6366 mconroy@saintphilips.net

Allison Chumbley, Board Chair and Search Committee Co-Chair, The de Paul School, Louisville, KY. Co-ed, K-8 independent school for children with learning differences, 175 students
C (502) 380-2531 achumbley@ups.com

David Brown, Board Chair and Head of School Search Comm Chair, Greensboro Day School, Greensboro, NC, PK-12 Co-ed day school, 750 students
O (336) 419-4902 dbrown@goldbergsegalla.com

References for Michael Murphy

Didi Biesman, Chair, Board of Trustees, Jewish Middle School of Nashville, Strategic Planning
C (615) 708-5799 ddbies@gmail.com

Dennis Leary, Immediate Past Chair, Board of Trustees, Shorecrest Preparatory School,
(727) 480-1026 dennis@ahip-holdings.com

Barbara Hodges, President , Florida Council of Independent Schools,
813-287-2820 bhodges@fcis.org



Scope of Service

To assist Search Committee in its selection of an outstanding interim CEO for June 2021, and permanent CEO for 2022, Educational Directions (EduDx) will provide superior candidate recruitment, thorough support of a search process tailored to the culture and mission of Audubon Schools (AS), timely and informed professional interaction with the Search Committee and candidates, and guidance based on many years of experience as independent school leaders, trustees and consultants. Our fee for the Audubon Schools search would be \$60,000 plus travel expenses and third-party background checks.

Interim Head of School (CEO) Search

Educational Directions connects schools that need an interim CEO/Head with potential candidates.

The potential candidates are former school heads who have confirmed with their interest in serving as interim heads. They will bring their seasoned leadership to your interim year. Your school will benefit from their leadership and from their experience with the challenges you want addressed during the interim year.

As a part of the proposal to assist the F.A.M.E., Inc. Board with a search for a permanent CEO, we will forward information about the needs to the Audubon Schools to approximately 100 potential candidates.

The Interim CEO position will be listed in [The Blue Sheet](#).

The experienced Heads will contact Audubon Schools directly.

Permanent CEO Position Process

Phase I: We begin with thorough preparation and organization.

- ❑ Review background information about Audubon Schools (e.g., strategic plan, reaccreditation report, campaign feasibility study, finances, operations, etc.)
- ❑ Visit AS to develop a strong personal knowledge of the school and to discuss with the Search Committee (SC), the Board of Directors and many other members of the school community the culture of the school and the challenges and opportunities for AS in the coming years
- ❑ Develop an on-line "search survey" for the board and/or school community
- ❑ Discuss and help to develop specific strategic needs the next CEO will embrace
- ❑ Based on what we learn from all the above, draft a compelling search prospectus describing the school, the opportunities and challenges, and the profile of the ideal candidate
- ❑ Finalize the search prospectus with the Search Committee
- ❑ Develop with the Search Committee the search calendar
- ❑ Develop with the Search Committee a communications strategy so that the search process is communicated clearly and in a timely manner to the AS community

Phase II: Recruit a diverse pool of outstanding candidates who fit the profile of the ideal candidate for Audubon Schools by targeting and recruiting educational leaders whether or



not they are seeking a new position.

- ❑ Research our extensive database for candidate prospects; request nominations from prominent educators and leaders throughout the world; reach out to Audubon Schools constituencies including French immersion and Montessori associations and schools for nominations; advertise in appropriate venues including *The Blue Sheet*, LinkedIn, and SAIS
- ❑ Contact nontraditional candidates whose expertise make them intriguing candidates
- ❑ Email the search prospectus to all candidate prospects with our warm, personal invitation to discuss the opportunity
- ❑ Follow up with promising candidate prospects by initiating personal interviews, maintaining close and encouraging contact and checking references

Phase III: Guide the Search Committee in the selection of “semifinalists” and in the design and implementation of the semifinalist interviews.

- ❑ From the candidate prospects who become candidates, identify a small number for the Search Committee’s consideration— those candidates who have “high potential” and who match the profile of the ideal candidate (ca. 10-15 candidates)
- ❑ Provide each member of the Search Committee with a complete set of the applications and pre-recorded interviews of the high potential candidates and coach committee members on assessment
- ❑ Meet with the Search Committee to facilitate and advise its selection of seven semifinalists
- ❑ Assist the Search Committee in creating a thorough, professional interview format, thoughtful and probing interview questions and coordinating the interview schedule
- ❑ Arrange for third party background checks of each semifinalist
- ❑ Assist the semifinalists with thorough preparation for the interviews
- ❑ Attend the semifinalist interviews

Phase IV: Guide the Search Committee in the selection of “finalists” and in the design and implementation of the finalist interviews and deep background reference checking.

- ❑ Following semifinalist interviews, meet with the Search Committee to facilitate and advise the selection of three finalists
- ❑ Assist the Search Committee in creating an inclusive finalist interview format and in coordinating the interview schedule
- ❑ Assist the Search Committee collecting and processing survey comments of all who meet the finalists
- ❑ Set up deep background reference checking by search committee members and coach committee members on reference checking
- ❑ Prepare Search Chair and Board President for exit interviews with finalists
- ❑ Assist the finalists with thorough preparation for the interviews

Phase V: Assist the Search Committee in bringing the search to successful closure. *(N.B. We will have advised the Search Committee on compensation and family considerations of the candidates at the time they were being considered for semifinalist selection.)*

- ❑ Counsel the Search Committee on how best to consider in its final deliberations all the information it has on the finalists



- ❑ Provide the Search Committee in advance of its final deliberations with a sample letter of agreement; a plan for presenting the successful candidate to the Board of Directors for approval and sample announcements to the school and broader community

Phase VI: Promote a long and successful tenure for the new CEO of School of Audubon Schools through specific, thoughtful transition planning.

- ❑ Advise the Search Committee on the most successful transition practices
- ❑ Remain available for consultation in the transition year and beyond
- ❑ Assist the Transition Committee with the preparation of a thorough transition plan
- ❑ Option to develop a more formal transition/coaching contract for up to two years.

Educational Directions follows the National Association of Independent Schools' *Principles of Good Practice for Independent School Search Committees and Search Consultants*.



Audubon Schools: Proposed Search Calendar

Interim CEO For July 2021

February- April

Provide Search Committee with list of experienced Heads seeking interim positions

Permanent CEO for July 2022

February & April- Preparations

- ❑ Immediately place the opening in *The Blue Sheet*
- ❑ Finalize search calendar and process
- ❑ Develop communications plan
- ❑ Visit AS when school is in full swing, virtually or in-person, for a two-day visit to experience and learn about the school, conduct individual and group meetings with administrators, faculty, staff, students, and parents
- ❑ Create the "search prospectus" to be approved by the Search Committee no later than April 15, 2021.

March through August - Recruit Candidates

- ❑ Post opening and prospectus with charter school, principal associations, Montessori schools and French language schools and association career sites.
- ❑ Recruit candidates who match the profile of the ideal new CEO
- ❑ Conduct follow up interviews and focus groups with AS community members
- ❑ Work with Search Committee on plans for semifinalist and finalist interviews

Late August and early September - Semifinalists

- ❑ Search Committee meets to select semifinalists and finalize plans for semifinalist interviews
- ❑ Two days of semifinalist interviews and selection of finalists

Late September through mid-October - Finalists

- ❑ Three finalists participate in two-day, on campus interviews
- ❑ Invite and review real-time constituency input about finalists via electronic survey
- ❑ Deep background reference checking completed by SC
- ❑ Search Committee selects the successful candidate to present to the Board of Directors
- ❑ Contract should be finalized no later than November 1
- ❑ Announcement and start of transition

December - Transition Planning

It is our custom to have weekly, sometimes twice weekly, updates on the progress of the search with the Chair of the Search Committee. We also incorporate into the final calendar, a schedule of updates to the school community from the Search Chair.



Audubon Schools: Estimate of Search Expenses

Search Fee	\$60,000
Consultant Travel to/from AS possibly two times or more if desired (flights, mileage, lodging, meals)	\$3,000
Semifinalist Interviews weekend Transportation, food & lodging for 7 candidates	\$6,000
Third party background checks for semifinalists	\$1,500
Finalist Interviews Transportation, food, lodging & receptions for three candidates with spouses for two-day visits	\$6,000
Total	\$75,500

CEO - Elect Expenses

Announcements	\$1,000
School Visits CEO-elect (often with spouse and children) visits to Audubon Schools 2 or 3 times prior to official start date.	\$2,000-\$4,000
Moving Expenses for CEO and Family	\$20,000
Welcome Receptions for new CEO & family	\$2,500