

REQUEST FOR PROPOSAL

SUPERINTENDENT SEARCH SERVICES

FOR

SACRAMENTO CITY UNIFIED SCHOOL DISTRICT

5735 47TH Avenue
Sacramento, CA 95824

July 24, 2023

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INSTRUCTIONS TO PROPOSERS

No proposals shall receive consideration by the Sacramento City Unified School District for Request for Proposal unless made in accordance with the following instructions:

1. Deadline for Receipt of Proposals. One electronic copy of the proposal shall be sent to SCUSDSearch@scusd.edu on or before August 8, 2023 at 5:00 p.m.
2. Requests for Information. Any questions relative to the proposal regarding documents, discrepancies, omissions or doubt as to meanings should be directed to Anne Collins, Lozano Smith, One Capitol Mall, Suite 640, Sacramento, CA 95814, (916) 329-7433, acollins@lozanosmith.com.
3. Proposal Forms. Proposal must be made in the format specified by the District. All items should be addressed. Numbers should be stated in figures, and the signatures of all individuals must be in longhand. The submission should be made without interlineations, alterations, or erasures.
4. Non-Collusion Declaration. Each Proposer must return a fully executed Non-Collusion Declaration, as required by Public Contract Code section 7106, with the completed proposal. The Non-Collusion Declaration is included in this package.
5. Execution of Forms. Each proposal must give the full business address of the Proposer and must be signed by the Proposer with his/her/their usual signature. Proposals by partnerships must furnish the full names of all partners and must be signed in the partnership name by a general partner with authority to bind the partnership in such matters. Proposals by corporations must be signed with the legal name of the corporation, followed by the signature and designation of the president, secretary, or other person authorized to bind the corporation in this matter. The name of each person signing shall also be typed or printed below the signature. When requested by the District, satisfactory evidence of the authority of the officer signing on behalf of the corporation shall be furnished. A Proposer's failure to properly sign required forms may result in rejection of the proposal.
6. Addenda or Bulletins. Any addenda or bulletins issued prior to the RFP due date shall form a part of the specifications issued to Proposers for the preparation of their proposals and shall constitute a part of the contract documents.
7. Award of Contract. The District reserves the right to reject any and all proposals, to contract work with whomever and in whatever manner the District decides, to abandon the work entirely and to waive any informality or non-substantive irregularity in the best interest of the District.

8. Rejection of Proposals. The District reserves the right to accept or reject any and all proposals, or any portion or combination thereof, or award on the basis of the total proposal.

9. Execution of Contract. The successful Proposer shall, within fourteen (14) calendar days of the notice of award of the contract, sign and deliver to the District an executed contract. If the Proposer to whom an award is made fails or refuses to execute the contract within fourteen calendar days from the date of receiving notification that the contract has been awarded to the Proposer, then the District may award the work to the next best match Proposer, as determined by the Governing Board, or may reject all proposals and call for new proposals.

10. Evidence of Responsibility. Upon the request of the District, a Proposer shall submit promptly to the District satisfactory evidence showing the Proposer's financial resources, the Proposer's experience in the type of work being required by the District, the Proposer's organization available for the performance of the contract and any other required evidence of the Proposer's qualifications to perform the proposed contract. The District may consider such evidence before making its decision awarding the proposed contract. Failure to submit evidence of a Proposer's responsibility to perform the proposed contract may result in rejection of the proposal.

11. Proposal Exception. All exceptions which are taken to the requirements of this request for proposals must be stated clearly. The taking of exceptions or providing false, incomplete or unresponsive statements may result in the disqualification of the proposal. Allowance of exceptions will be determined by the Board of Trustees, whose decisions shall be final.

12. Proposal Negotiations. A proposal response to any specific item of the RFP with terms such as "negotiable" "will negotiate" or similar, will be considered as non-compliant with that specific term.

13. Indemnity. The Proposer must hold harmless and fully indemnify the District, its Board of Trustees, officers, employees and agents from all damages or claims for damages, costs or expenses that may at any time arise out of the Proposer's performance of, or failure to perform acts, required by the contract documents, including by not limited to infringement or use of any copyrighted composition, secret process, patented or unpatented invention, article or appliance furnished or used in connection with this proposal.

14. Prevailing Law. In the event of any conflict or ambiguity between these instructions and state or federal law or regulations, the latter shall prevail. Additionally, all services to be performed under the proposal shall conform to all applicable requirements of local, state and federal law.

15. Rights and Remedies in the Event of Default. If the Proposer defaults, the District may procure services from other sources and may recover the loss occasioned thereby

from any unpaid balance due the Proposer or by suite against the Proposer. The prices paid by the District shall be considered the prevailing market prices at the time such purchase is made.

16. Governing Law and Venue. In the event of litigation, the proposed documents, specifications and related matter shall be governed by and construed in accordance with the laws of the State of California. Venue shall be with the appropriate state or federal court located in Sacramento County.

17. Insurance Requirements. All insurance must be issued by an Admitted Surety in the State of California.

Liability Insurance: The successful Proposer shall acquire and maintain such insurance as will protect Proposer and District from claims for damages because of bodily injury, including death, and from claims for damages to property which may arise out of or result from Proposer's operations under this Contract, whether such operations be by Proposer or anyone directly or indirectly employed by the Proposer. This insurance shall name District as an additional insured and shall be written for not less than Five Hundred Thousand Dollars (\$500,000.00) per person, One Million Dollars (\$1,000,000.00) per occurrence and One Hundred Thousand Dollars (\$100,000.00) for property damage. Certificates of such insurance shall be filed with the District upon contract. The Certificates of Insurance will state that the contractual liability assumed is covered and shall provide that ten (10) day notice of cancellation or reduction in coverage shall be given to the District.

Workers Compensation Insurance: Proposer represents that Proposer has secured the payment of Workers Compensation Insurance in compliance with the provisions of the Labor Code of the State of California and during the performance of this work will continue to provide workers' compensation insurance. Proposer shall supply the District with certificates of insurance evidencing that Workers Compensation Insurance is in effect and providing that the District will receive ten (10) days notice of cancellation. If Proposer self-insures Workers Compensation, a Certificate of Consent to Self-Insure must be provided to District.

Automobile Liability: \$1,000,000 per accident for bodily injury and property damage.

18. Cost of Making Proposal. All costs for preparation and presentation of proposals, including but not limited to travel and time spent for interviewing, shall be borne by the Proposer.

19. Retention of Proposals. The District reserves the right to retain all proposals, whether selected or rejected.

SPECIFICATIONS

It is the intent of the District to enter into an agreement with the successful proposal for Superintendent Search services commencing as early as August 18, 2023.

All prices must be guaranteed.

RFP Contents:

- Section 1 - Purpose of RFP and General Provisions
- Section 2 - Schedule of Events
- Section 3 - Scope of Services
- Section 4 - Proposal Evaluations
- Section 5 - Proposal Instructions and Format

SECTION 1 PURPOSE OF REQUEST FOR PROPOSAL AND GENERAL PROVISIONS

PURPOSE OF REQUEST FOR PROPOSAL (RFP)

The District operates under a locally-elected seven member Board form of government and provides educational services to grades transitional kindergarten (TK) through twelfth (12th) as mandated by the State and/or Federal agencies. The District serves approximately 38,821 students at 75 schools, spanning seventy square miles. These 75 schools include 44 elementary schools, 8 K-8 schools, 6 middle schools, 11 high schools, multiple grade schools, adult education schools, and charter schools.

The purpose of this RFP is to seek a company that will assist the District in selecting a Superintendent candidate. The successful company will help the District by helping us identify traits, skill sets and other factors that will result in a positive match for both the District and the future Superintendent.

This document contains instructions and requirements including the format in which responsive proposals must be submitted. Proposers are urged to carefully read all sections of the RFP to ensure that the scope of required services and provider responsibilities is to be fully understood. Proposers shall provide evidence of their expertise, professional management capabilities and qualifications in all areas concerning the service.

QUESTIONS CONCERNING RFP

Any questions, interpretations or clarifications, either administrative or technical about this RFP, must be requested in writing. All written questions will be answered in writing and conveyed to all Proposers.

Oral statements concerning the meaning or intent of the contents of the RFP by any person are unauthorized and invalid. All questions, technical, programmatic, or process must be directed to:

**Anne Collins
Lozano Smith
One Capitol Mall, Suite 640
Sacramento, CA 95814
acollins@lozanosmith.com
(916) 329-7433**

SECTION 2 SCHEDULE OF EVENTS

The following schedule will be used by the District in awarding a contract of the subject RFP.

Proposal submitted to District	August 8, 2023 by 5:00 p.m.
End Proposal Evaluation Period	The Board could decide as early as August 17 th and identified Proposers should be ready to present to the Board, if requested, at the August 17 th , 2023 Board meeting.
Contract Start Date	As early as August 18, 2023, but no later than 10 days after Board selection of the Proposer.
Superintendent Interview Process	To Be Determined
Candidate Evaluation Period	To Be Determined
Superintendent Selection	To Be Determined
Anticipated Superintendent Start Date	January 1, 2024 , but may be later.

SECTION 3 SCOPE OF SERVICES

It is the desire of the District's Board of Trustees to work with the successful company to help develop a list of traits, skill sets and other factors that will benefit the District and its over 38,000+ students. The selected vendor will work with the District's Board Trustees and interview key personnel that will aid in the identification of roles, responsibilities and other important factors that must be taken into consideration when trying to match a school district with a Superintendent. The successful company will have an action plan and be able to gather the required information in a timely manner to meet the Board Trustees' objectives.

After developing a list of job characteristics with the District Board of Trustees, the successful company will actively advertise the job opening in a manner that gains both the most exposure and successful outcome. The successful company will utilize their acquired expertise aiding the District with successful advertising techniques and advise the Board Trustees throughout the entire process. A contact person with the successful company will be identified as the person whom all communication will pass through with the District.

At the end of the advertising period and a list of candidates has been pooled, the District's Board Trustees will evaluate the candidates and make a determination whether the outside list of candidates is acceptable. The Board of Trustees will either make a selection from the pool of candidates or we may require the company to further help refine our search process. The District's Board Trustees will make the determination after the compilation of all candidates has been examined.

GENERAL TASKS

In general, the successful Proposer may be required to provide some or all of the following services to the Board in order to facilitate the recruitment of a Superintendent:

- Prepare marketing materials for review and approval by Board Trustees.
- Recruit and otherwise identify potential candidates.
- Receive and process application information from candidates.
- Perform thorough reference and background checks.
- Develop evaluation criteria to be approved by the Board.
- Rank candidates according to accepted evaluation criteria.
- Assist the Board in preparing for, conducting and evaluating the candidate interviews.
- Provide support, as requested, and coordinate with the Board's process to engage the Sacramento City Unified School District community in the selection process and recommend when and what should be shared with the community throughout the process.
- Provide technical assistance in negotiating the terms of the selected candidate's employment contract.
- Provide regular (bi-weekly or weekly) status reports.

SPECIFIC TASKS

More specifically, the Proposer shall be prepared to perform the following services:

- Within ten (10) business days of contract award, hold initial meetings with the Board's Executive Committee to discuss and develop a strategy for carrying out the recruitment of the Superintendent and such other action items as the Board requests, including but not limited to preparation of a job description.
- Meet with the stakeholders to gather the profile of the superintendent candidates to be sought.
- Recommend if and how the stakeholders can be involved in the superintendent search process.
- Recruit/identify potential candidates for Superintendent on both a local and nationwide basis.
- Advertise and otherwise raise awareness on a national basis of the District's interest in recruiting a qualified candidate from both a local and national search for the Superintendent position.
- Review resumes for background, qualifications, and relevant experience, and develop an initial list of candidates with the most promising qualifications.
- Evaluate candidates for serious consideration by the Board, by conducting in-depth reference checks with appropriate individuals to collect information that

will be used to reevaluate each candidate's performance in prior position(s) and other relevant information.

- Through these reference checks, ascertain the candidates' strength in personal dimensions identified by a job description.
- From the initial pool of candidates, assist in narrowing the field to a smaller group. For this smaller group, the contractor may be called upon to perform and provide background checks of each candidate, including his/her/their educational, criminal, financial, and any other type of checks deemed appropriate to ascertain or verify any other information deemed relevant.
- As requested, meet with the Board throughout the search process to, among other things, review applications and materials, discuss qualifications of potential candidates, prepare for interviews, update status of search, and assist in evaluation of candidates after interviews.
- Provide the Board with binders for all candidates who will be interviewed, including a narrative that sets forth each candidate's relative merits, the results of all background checks (references, criminal, financial, etc.), any specific questions/areas of interest that the Board should consider during an interview of such candidate, and any other information that the Board or the contractor considers appropriate.
- Provide assistance to the Board regarding interviewing, scoring and evaluating candidates. Assist the Board in preparing for each candidate interview, by, among other things, providing the Board members with written questions for each candidate. Assist the Board in scoring/evaluating candidates.
- Attend and participate in interviews of candidates by the Board.
- Schedule and hold a meeting (or series of meetings) with the Board following the interviews to discuss the results of the interviews. This process shall continue until the Board has agreed upon candidates for further consideration.
- Throughout the search process the Proposer may be required to attend Board meetings, apprise the Board of the status of the search process and address such other issues as are raised by the Board. As directed, the consultant may be called upon to provide regular (weekly or bi-weekly) written status reports to the Board.
- Provide support to the Board, as requested, to develop and implement a process for engaging the community in the selection process.
- Perform the tasks as outlined in an expeditious manner which will allow the position to be filled within the desired timeframe.
- Perform such other specific tasks as requested by the Board to facilitate the selection of a Superintendent.

SECTION 4 PROPOSAL EVALUATIONS

OVERVIEW

This RFP is designed to develop the best business solution to meet the needs of the District. Proposals will be reviewed for content, completeness, experience, qualifications, means of providing the service and adequate financial ability to provide the best solution for consideration and implementation.

After those firms deemed to be the most qualified are selected, further evaluation and interviews of the selected firms may be conducted as part of the final selection process. By responding to this RFP, Proposer acknowledges that acceptable Proposers may be interviewed by the Board of Trustees who shall make the sole determination of the award of the executive search contract based on review of the proposals.

The Board Trustees' reserves the right to complete the selection process without proceeding to an interview process and make a selection based solely on the information provided in the Proposal.

By responding to this RFP, Proposer acknowledges that this agreement is for the performance of a service and shall be determined upon finding the best match for the purposes of the District's Board of Trustees and that lowest responsible proposer requirements do not apply.

SECTION 5 PROPOSAL INSTRUCTIONS AND FORMAT

INTRODUCTION

To be considered responsive to this RFP, Proposer must submit electronic copy of the proposal in the format identified in this section. All requirements and questions in the RFP must be addressed and all requested data must be supplied. The District reserves the right to request additional information that, in the District's opinion, is necessary to assure that the Proposer's competence, number of qualified employees, business organization and financial resources are adequate to perform according to contract.

PREPARATION

Proposals should be prepared in such a way as to provide a straightforward, concise delineation of capabilities to satisfy the requirements of this RFP. Proposals should emphasize the Proposer's demonstrated capability to perform the required service. Expensive bindings, colored displays, promotional materials, etc., are not necessary or desired. However, literature describing the proposed services and extent of support included in the proposal should be forwarded as part of the proposal.

PROPOSAL FORMAT

In order for a proposal to be considered, said proposal must strictly adhere to the following format for organization and content. Proposal must be divided into the individual sections listed below, indexed, and tabbed. The proposal must be sent via pdf to the email SCUSDSearch@scusd.edu.

PART I – COVER LETTER

The cover letter shall include a brief statement of intent to perform the service, qualifications for selection and signature of an authorized officer of the organization who has legal authority in such transactions. Proposals with unsigned cover letters will be rejected. The cover letter must also provide the name, position, and full contact information for the individual designated as the Proposer's contact for this proposal.

In addition, Proposer's cover letter shall expressly state that, should the Proposer's proposal be accepted, the Proposer agrees to enter into a contract under the terms and conditions shown in the Instruction to Proposers and the Specifications.

PART II – TABLE OF CONTENTS

The table of contents shall identify the contents of the proposal in a format consistent with the proposal requirements and format set forth herein.

PART III – BACKGROUND AND EXPERIENCE

Each Proposer shall include a description of the professional and technical experiences, background, qualifications and expertise of the organization's key personnel assigned to this project. The description shall show that the Proposer possesses the demonstrated skills and experience in specific areas of the project scope. The Proposals shall include:

1. Proposer(s) name, address, telephone and fax numbers, e-mail address, and authorized representative(s).
2. Give a background of the company and detail any projects that relate specifically to this project.
3. List how long the company has been in business conducting this type of service.
4. The Proposer must supply a list of five (5) school district references that are within the state of California with whom they have worked. References must include the contact person's name, organization, address, phone number and email if available. The Proposer will also list the type of project and scope of work to be performed and give a timeline for the project.
5. Upon request by the District, Proposer shall submit promptly to the District satisfactory evidence showing the Proposer's financial resources, the Proposer's experience in the type of work being required by the District, the Proposer's organizations available for the performance of the contract and any other required evidence of the Proposer's qualifications to perform the proposed contract. The District may consider such evidence before making its decision awarding the proposed contract. Failure to submit evidence of a Proposer's responsibility to perform the proposed contract may result in rejection of the Proposal.
 - a. The successful Proposer must demonstrate sufficiency of financial resources and the ability to perform the contract.
 - b. The successful Proposer must demonstrate that they have sufficient equipment and services to perform the contract and provide service promptly, without delay or interference.

PART IV – STATEMENT OF WORK/ACTION PLAN

The work plan shall describe how the Proposer would assist the District in reaching its goals as set forth in this RFP. The Proposer should fully explain in detail their methodology to accomplish this project. Timelines, meetings, district responsibilities and all other important information should be included in this section with clear detail.

The Proposer should be able to demonstrate its ability to meet deadlines and to assign staff commensurate with meeting the scope of service and other business issues occurring within the District.

Proposers should use this section to address the ability of Proposer's firm to undertake the project, considering Proposer's current and anticipated workload, and the District's desire to proceed with the project immediately and according to the timetable set forth in Section 2.

PART V – RFP PRICE FORM

Proposer shall return a fully executed Request for Proposal Price Form, fully executed in accordance with the Instruction to Proposers. Proposals for the Service will be accepted as outlined in this Request for Proposal (RFP). The fees shall include the cost of all labor, materials, equipment, supplies and space necessary.

PART VI – NON-COLLUSION DECLARATION

Proposer must return a fully executed non-Collusion affidavit, as required by Public Contract Code section 7106, with the completed proposal.

PART VII – ADDENDA FORM

Proposer shall acknowledge all Addenda received.

REQUEST FOR PROPOSAL PRICE FORM

Sacramento City Unified School District
5735 47TH Avenue
Sacramento, CA 95824

RE: Request for Proposal – Superintendent Search

Dear Members of the Board of Trustees:

The undersigned, doing business under the firm name of _____, having carefully examined the Notice to Proposers, the Instructions, and the Specifications for the proposed _____, proposes to perform the contract, including all of its component parts, and to furnish all services, and taxes called for by them for the entire order, as follows:

Amount of proposal _____

SUBMITTED BY:

COMPANY

ADDRESS

CITY/STATE/ZIP

SIGNATURE

PLEASE TYPE OR PRINT NAME

TITLE

DATE

PHONE

NON-COLLUSION DECLARATION

State of California)
)
County of _____) ss.

I, _____, being duly sworn, declare that I am _____ of _____, the party making the foregoing proposal that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the Proposer has not directly or indirectly induced or colluded, conspired, connived, or agreed with any other Proposer or anyone else to put in a sham proposal, or that anyone shall refrain from proposing; that the Proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Proposer or any other Proposer, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other Proposer, or to secure any advantage against the public body awarding the contract or anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the Proposer has not, directly or indirectly, submitted his/her/their proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated this _____ day of _____, 20____ at _____ California.

Signature

ADDENDA

The undersigned acknowledges receipt of the following addenda and the cost, if any, of such revisions has been included in the Lump Sum Grand Total of your proposal.

Addenda No. _____ Dated _____

Addenda No. _____ Dated _____

Addenda No. _____ Dated _____

Addenda No. _____ Dated _____

Name of Proposer _____