



ISAACSON, MILLER

Executive Search Proposal

BOSTON PUBLIC SCHOOLS

Superintendent

November 29, 2018

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*Recruiting exceptional leaders
for mission-driven organizations*

November 29, 2018

Ms. Alexandra Oliver-Dávila
Dr. J. Keith Motley
Boston School Committee
Bruce C. Bolling Municipal Building
2300 Washington Street
Roxbury, MA 02119

Re: Superintendent Search

Dear Ms. Oliver-Dávila and Dr. Motley:

Thank you for the opportunity to present this information for your consideration in the search for the next Superintendent of Boston Public Schools (BPS). Isaacson, Miller would welcome the chance to partner with you on this important recruitment. BPS has shown national leadership in educational improvement and has achieved remarkable results for its students. There is no civic institution more important to this community, not to mention its national impact on the field of urban education more broadly, and it would be a privilege to serve your needs. This letter and the attached materials provide information on our firm, search process, proposed team, relevant experience, and fee structure.

FIRM PROFILE

Isaacson, Miller was founded in 1982 to recruit exceptional leaders for mission-driven organizations. From the beginning, we have been committed to strengthening and diversifying the leadership of the civic sector. Today, the firm is a 100% employee-owned corporation, with approximately 200 employees, 70% of whom are women, 22% people of color. Our headquarters is located in Boston, with offices in Philadelphia, San Francisco, and Washington, DC, as well. We conduct over 300 senior-level executive searches each year and have completed over 6,300 searches over the past 36 years.

Our clients include foundations, PreK-12 and education improvement organizations, leading colleges and universities, research centers of many kinds, advocacy groups, arts and cultural institutions, economic and community development enterprises, and human services groups, among others. Last year, more than 80% of our clients were organizations that returned to Isaacson, Miller for additional searches after being pleased with our past results.

What distinguishes Isaacson, Miller first and foremost is that our work is grounded in our core institutional commitment to the strengthening of civic infrastructure and our fundamental resonance with our clients' missions. This commitment is paired with a meticulous and disciplined approach to the work, with no time or effort spared to achieve an outstanding result.

Specifically, Isaacson, Miller differentiates itself in several other important ways:

- We devote special care to grasping the strategic challenges and organizational culture of each client and to developing a customized research plan for each search. We network assiduously, making every effort to cultivate candidates who are not actively seeking a new position.
- At the appropriate time, we engage in extensive reference checking on candidates. In general, we secure references from supervisors, supervisees, and peers, and we routinely go “off list” and conduct references with people who know them but who have not been hand-selected as references by the candidate. This might include school board members, parent group leaders, and union leadership. We also conduct academic and criminal background checks on all finalists as a matter of course.
- From the founding of our firm, we have held a fundamental commitment to bringing women and people from under-represented populations to positions of leadership. Over the life of the firm, 43% of our placements across all sectors have been women, and 23% have been people of color.
- We are recognized for the high level of service and personal attention provided to our clients. We work closely with the search committee throughout the search. We involve other key stakeholders early in the search as we are developing a position profile. We view our engagement with our clients as a partnership built on transparency and collaboration. This commitment to a high level of personal service means that we are selective and careful about the number of search assignments that we undertake at any one time. Given the visibility and importance of this search in particular, it would be our highest priority.
- To serve the search needs of complex organizations, we have developed a highly sophisticated infrastructure, including: a specialized research group, dedicated reference professionals, and the extensive network of potential candidates and sources that arises from a significant volume of searches, all while preserving our emphasis on mission, personal attention to clients and candidates, and excellence in service.

RELEVANT EXPERIENCE

Our firm has a long history of success in conducting executive leadership searches in PreK-12 education, education improvement, policy, and higher education. This work, especially with education foundations, brings us into regular contact with leading superintendents around the country and will enable us to identify outstanding candidates for this role. Our education practice does not pursue many superintendent searches, though our track record includes the appointment of Lois Harrison-Jones in Boston Public Schools and Steven Adamowski in Hartford, CT. However, this is a rare opportunity so well aligned with our mission that this is a position we are compelled to pursue.

We have experience recruiting leaders for foundations deeply invested in education, such as the Annie E. Casey Foundation, Barr Foundation, Carnegie Corporation, McKnight Foundation, Surdna Foundation, William and Flora Hewlett Foundation, and W.K. Kellogg Foundation, and we would be able to call upon these networks for candidates as well as sources. We have also

conducted searches for major public educational leadership positions, such as the New York State Commissioner of Education, which give us an understanding of the intensive stakeholder engagement necessary and facility to develop a process that serves your needs throughout this critical assignment.

We have included within this proposal lists of our relevant work. We would like to highlight the following searches as particularly relevant to Boston Public Schools:

- The Accelerated Schools – Chief Academic Officer
- Alliance for Excellent Education – President
- Carnegie Corporation of New York – Program Director, New Designs for Schools and Systems; Program Director, Teaching and Human Capital Management
- The College Board – President (twice)
- The Community Renewal Team of Greater Hartford – Director of Early Care and Education
- Education Development Center – Director of Leadership for Learning Innovation
- The Education Trust – President; Vice President Higher Education Policy and Practice
- The Education Trust-West – Executive Director
- The Institute for College Access and Success – President
- James B. Hunt Jr. Institute for Educational Leadership and Policy – Director
- KnowledgeWorks – Chief Executive Officer
- National Board for Professional Teaching Standards – President and Chief Executive Officer; Vice President for Standards and Assessment
- National Center for Educational Accountability – Chief Executive Officer
- National Science Teachers Association – Executive Director
- National Urban League – Vice President for Education and Youth Development; Vice President of Workforce Development
- North Carolina Science, Mathematics, and Technology Education Center – President and Chief Executive Officer
- NEA Foundation – President and Chief Executive Officer
- NWEA – Chief Executive Officer
- Phi Delta Kappa International – Chief Executive Officer
- Philadelphia Academy of School Leaders – Executive Director
- RAND Education – Director; Distinguished Chair in Education Policy
- Robin Hood Foundation – Director of Early Childhood Programs
- Sandler Foundation – Director of Operations for the Institute for Education Policy, Inc.
- The Schott Foundation for Public Education – Program Director for Early Care and Education
- University of Chicago Laboratory Schools – Director
- The Urban Institute – Director, Education Policy Center
- W.K. Kellogg Foundation – Vice President for Youth and Education Programs
- The Wallace Foundation – Deputy Director for Education
- William and Flora Hewlett Foundation – Director of the Education Program; Education Program Officer
- WorldTeach – Executive Director

We have attached a full list of our searches in the preK-12 education and educational improvement fields, as well as references and contact information. You may also wish to visit our website, www.imsearch.com, which highlights some of our current searches and recent placements.

OUR APPROACH TO SEARCH

Isaacson, Miller has a simple but disciplined search process, described in more detail in the attached material. Our process includes three essential activities—definition, candidate discovery, and selection—which are built around a schedule, with each deliverable and decision point planned with you at the launch. We spend our earliest time in the search learning from our clients and their various stakeholders so that we can say simply and clearly on their behalf what makes the job compelling and what constitutes success in the role. We follow this with an extensive effort to persuade the most talented people to become candidates. In a typical search, we contact over 300 individuals as either prospective candidates or sources.

We personally interview all candidates before they are presented to the search committee. We believe in transparency, and we keep the committee updated on all of the individuals we approach and their status in the search.

We pride ourselves on providing extraordinary service and personal attention to our clients. We view our engagement with our clients as a partnership built on transparency and collaboration. We work closely with you, maintaining frequent communication throughout all stages of the search. Search documents such as resumes, prospect lists, progress reports, and references are made available through a secure online document management system.

We are known for treating all of our contacts with respect. We take particular care to keep prospective candidates advised of their status, to handle rejected candidates with consideration, and to inform our important sources of the progress of the search. While this attention to process is time consuming, it is an important service to our clients, whose own reputations are at stake.

OUR COMMITMENT TO DIVERSITY

In every search, Isaacson, Miller works diligently to identify a diverse and inclusive pool of candidates. Through our efforts, people from underrepresented groups have been recruited to key leadership positions throughout the country. In the course of over three decades, we have established an extensive network of contacts who recognize that our commitment to diversity is genuine and our track record is unparalleled. We call and build upon this network in every search we do. In 2017, 52% of our searches have resulted in the hiring of women and 27% in the hiring of people of color.

Our demonstrated commitment to diversity continues to evolve as our networks of talented leaders deepen and mature. Over the years, we have strengthened our efforts by expanding our understanding of diversity, which is inclusive of but not limited to race, gender, and sexual orientation, and by training our recruiters how best to build diverse pools. With every search, we expand our facility to identify individuals from underrepresented populations and deliver on our client's commitment to the field.

YOUR DEDICATED TEAM

If selected to partner with Boston School Committee, Ericka Miller and John Muckle, both partners in the firm, would co-lead this search on behalf of Isaacson, Miller. We would participate in all client meetings, interview candidates in depth, and provide advice and counsel to the search committee throughout the process. Katie Rockman, Managing Associate, would assist in candidate networking and recruiting, and would serve as project manager. We each would be fully committed to the search and would devote the necessary time to its successful completion.

Ericka Miller rejoined Isaacson, Miller in 2016 as a partner in the firm's Washington, DC, office. She leads our preK-12 education and education improvement practice and serves on the executive committee of the firm. Prior to returning to Isaacson, Miller, Ericka was the Vice President for Operations and Strategic Leadership at The Education Trust, leading the day-to-day management of the national education research and advocacy organization. After being nominated by President Barack Obama to be the Assistant Secretary for Postsecondary Education in the U.S. Department of Education, Ericka served as Senior Advisor to Secretary of Education Arne Duncan. She has held leadership roles in a number of mission-driven organizations, both as a staff member and a board member, and she currently serves on the boards of Editorial Projects in Education, the Institute for Educational Leadership, and the Institute for Higher Education Policy.

John Muckle heads Isaacson, Miller's science, technology, engineering, and mathematics (STEM) practice area and also serves on the executive committee of the firm. He is based in the Boston office and has been with the firm for over a decade, leading searches in higher education and with PreK-12 organizations, particularly those with a specific focus on advancing STEM education. He has served a number of education foundations and curriculum development organizations (e.g. TERC) to build their leadership teams, and he led the New York State Commissioner search previously referenced. Prior to Isaacson, Miller, John was with Opera Solutions, an international management consulting firm. Earlier in his career, John worked in campaign finance law enforcement for the Federal Election Commission.

Katie Rockman would assist in candidate networking and recruiting, and would serve as project manager. Katie works across the firm's PK-12, higher education, and philanthropy practice areas. She has served a variety of clients across the P-16 continuum in recent years, including the New York State Department of Education, the Massachusetts Charter Public School Association, the Carnegie Corporation of New York, the Hewlett Foundation, and the Massachusetts Department of Higher Education as well as a number of community colleges and education improvement organizations across the country. In addition, Katie has worked with a variety of independent school clients, conducting senior leadership searches for the Blake School, Interlochen Arts Academy, Edmund Burke School, and Moorestown Friends School, among others. Earlier in her career, Katie worked for an educational recruiting company that specializes in the placement of teachers and administrators in the K-12 sector.

We would be supported by a full team specialized in their respective roles. Our search coordinator would be responsible for all logistics and the management of production. A research specialist would work with us to build a comprehensive prospect list drawn from our network of 450,000 people and from targeted research and sourcing in the field. A reference specialist would

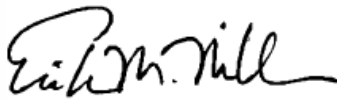
also join the team at the latter stages of the search. We allocate the work to individuals who know their roles and are well trained in their craft—senior team members interviewing candidates in person and in depth; specialists checking the public records and meticulously conducting references; and our team leadership consulting with you at every stage to deliver a comprehensive pool on time for your deliberations.

FEES AND EXPENSES

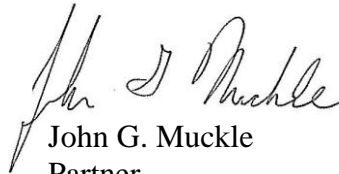
Isaacson, Miller works for clients on a retainer basis. Our fee is typically one-third of the amount that you agree to pay the hired candidate for the first year of employment, including without limitation salary, special deferred executive compensation, signing and performance bonuses, but not including contributions to federally qualified pension plans that are available to all employees. We also incur two types of reimbursable expenses, which are described in more detail, along with our guarantee, in the enclosed materials. We would also be open to discussing a fixed-fee arrangement if that is preferred.

Thank you again for inviting us to submit this proposal. We would be pleased to provide additional information and look forward to the opportunity for further discussion.

Sincerely,



Ericka M. Miller
Partner
(202) 682-1504
emiller@imsearch.com



John G. Muckle
Partner
(617) 262-6500
jmuckle@imsearch.com



ERICKA MILLER
PARTNER

Ericka Miller rejoined Isaacson, Miller in 2016 as a partner in our Washington, DC, office. Ericka leads the firm's preK-12 education and education improvement practice, and she serves on the firm's executive committee. An expert in preK-16 education and education policy, Ericka previously served as a partner at Isaacson, Miller before leaving the firm to become the Vice President for Operations and Strategic Leadership at The Education Trust, leading the day-to-day management of the national education research and advocacy organization. President Barack Obama nominated Ericka to be the Assistant Secretary for Postsecondary Education in the U.S. Department of Education in 2013. During the extended confirmation process, Ericka served as Senior Advisor to Secretary of Education Arne Duncan in the Department of Education.

Earlier in her career, Ericka served as President and Chief Operating Officer of the McKenzie Group (now part of American Institutes for Research), a comprehensive education consulting firm. From 1997 through 2000, she served as legislative assistant to U.S. Senator Bob Kerrey, advising the senator on elementary, secondary, and postsecondary education policy issues. Before her time on the Hill, Ericka was an assistant professor of English literature at Mills College in Oakland, California. Prior to launching her career in education, she was an editor at *Washingtonian* magazine.

Ericka is a member of Leadership Greater Washington's Class of 2004, and she serves on a number of nonprofit boards, including the Institute for Higher Education Policy, the Institute for Educational Leadership, and Editorial Projects in Education.

Location

- Washington, DC

Education

- BA, Georgetown University
- MA, Stanford University
- PhD, Stanford University

Focus Areas

- PreK-16 Education Improvement
- Education Advocacy
- Education Philanthropy



JOHN MUCKLE
PARTNER

John Muckle has been with Isaacson, Miller for more than a decade. He serves on the firm's executive committee and heads the science, technology, engineering, and mathematics (STEM) practice area for the firm, building scientific capacity at many leading academic institutions. He has recruited deans to many leading science and engineering schools and has led searches for institute directors and a range of other research leadership positions. He also has engaged in a number of the firm's most prominent university president and provost searches. He was a leader on the recent presidential searches for Duke University, The George Washington University, and New York University, among others. He also has recruited provosts for New York University, Tulane University, and the University of Pennsylvania.

Prior to Isaacson, Miller, John was with Opera Solutions, an international management consulting and data analytics firm serving Fortune 100 companies on a range of operations and strategy projects. Earlier in his career, John worked in campaign finance law investigation and enforcement for the Federal Election Commission.

Location

- Boston, MA

Education

- AB, Dartmouth College
- MBA, MIT Sloan School of Management



KATIE ROCKMAN
MANAGING ASSOCIATE

Katie joined Isaacson, Miller in 2012 and has served a variety of clients in the education sector, both K-12 organizations and colleges and universities, as well as several philanthropic organizations. She has conducted numerous higher education presidential searches, including placements at New York University, Central European University, The Julliard School, and EARTH University. Her deep experience across our firm's K-12 work includes searches for heads of independent schools, foundation program directors and officers, and executive directors of state education departments and a charter association.

Katie's prior work in education gives her first-hand knowledge of successful academic leadership. Before joining our firm, she was a member of the Office of External Relations at the MIT Sloan School of Management, where she helped create content and develop stewardship programs for the school's donor community. Earlier in her career, she worked for an educational recruiting company that specializes in placing K-12 teachers and administrators at independent schools across the country.

In all of her work, Katie brings a strong and consistent commitment to diversifying the leadership of the civic sector. Repeat clients, such as the Carnegie Corporation of New York and the Hewlett Foundation, speak to her strength in building real and lasting partnerships.

Location

- Boston, MA

Education

- BA, Yale University
- EdM, Harvard Graduate School of Education

REFERENCES

Organization: The Accelerated Schools
Search: Chief Academic Officer (*Ericka Miller worked on this search*)
Name: Leonard Rabinowitz
Title: Board Member, The Accelerated Schools
Phone: (310) 210-8600 cell
Email: lr@studiocl.com

Organization: New York State Education Department
Search: Commissioner (*John Muckle and Katie Rockman worked on this search*)
Name: MaryEllen Elia
Title: Commissioner of Education (IM hire)
Phone: (813) 495-6825 cell
Email: maryellenelia@gmail.com

Organization: Massachusetts Department of Higher Education
Search: Commissioner (*Katie Rockman worked on this search*)
Name: Christopher Gabrieli
Title: Chairman, Board of Higher Education, Commonwealth of Massachusetts
Phone: (617) 308-3800 cell
Email: chris@empowerschools.org

OUR APPROACH TO EXECUTIVE SEARCH

The Isaacson, Miller search process is simple but disciplined. We explain it in detail to our clients, adapt it to their requirements, and ask them to join us as partners in its implementation.

We typically divide a search into five phases:

- Phase 1: Understanding the Challenge;
- Phase 2: Networking and Screening of Prospective Candidates;
- Phase 3: Narrowing the Field: Semi-finalist Selection and Interviews;
- Phase 4: Selecting Finalists and Checking References; and
- Phase 5: The Final Choice.

Understanding the Challenge

We begin each search by asking our clients a deceptively modest question: “How would you know—one year, three years, or five years after you hire someone—that you had, in fact, hired exactly the right person?”

We interview as many stakeholders in the search as appropriate—senior management, board members, key staff and consultants—exploring with them the measures of success for this role.

We first want to learn the organization’s cultural clues. Most clients know within the first 90 days whether the new executive will survive. They do not know if he or she will actually succeed. That takes years. We want to understand the implicit values and standards of the organization so that we can find candidates with a skill set and a management style that fit.

On a more fundamental level, we ask our clients to make explicit the strategic goals that they expect to achieve with their new hire. We believe that search is a strategic act—that when you pick a person, you pick a path—and it is very useful to know the desired path when we design the search.

At the conclusion of our stakeholder interviews, we summarize, in writing, our understanding of the assignment: the organization, its context and strategic challenges, the specific objectives and expectations established for this particular role, and the resulting personal and professional characteristics of an ideal candidate. We review this “scope” document with our client and edit it until it is satisfactory. We often find this process helps to clarify, or even build, consensus within an organization about where it is going and what is expected of new people. It is also our way of ensuring that we share with our client the same understanding of the assignment as we begin to network for prospective candidates.

Networking and Screening of Prospective Candidates

In this phase, we ask, “What analogous experience would prepare a candidate for the challenges in this role?” Put another way, “Where does this person work today? What is he or she doing?”

We want to know what kinds of tasks and accomplishments prepare candidates in some reasonable way for the work they will face in this role.

Once we have identified target industries and fields, roles, institutions, and even individuals, we systematically canvass them to identify and interest candidates who match our requirements. Recognizing that our clients often have excellent networks themselves, we carefully pursue their suggestions. Where appropriate, we advertise in targeted publications or extend our outreach through postings on relevant websites and email lists. Our networking always includes a concerted effort to reach and interest qualified women and people of color.

Many of the people we identify are busy and successful in their current positions and are not looking for another assignment; we work closely with our client to protect the confidentiality of their interest. We take particular care to keep prospective candidates advised of their status, to handle rejected candidates with consideration, and to inform our client of the progress of the search on a regular basis. In some searches there are strong internal candidates as well. These individuals undergo the same screening and assessment process as outside candidates.

As we complete our outreach, we focus on reviewing resumes and conducting telephone screens. Through this process, we narrow the long list of prospects to a reasonable number of candidates to interview in person before referring them to our client.

Narrowing the Field: Semi-Finalist Selection and Interviews

When our clients hire us, they expect us to know and understand the people we present for their consideration. We take this responsibility seriously. Through intensive personal, biographical interviews, we learn each candidate's history. We track a person through his or her entire career, asking how the person landed in each successive role, what he or she discovered, what ideas and actions were essential to success, what conflicts erupted, and how the candidate measured results. When we walk carefully through a person's career, we begin to see the patterns. When we sum it up we ask, "Has this person encountered challenges that are analogous in scale and in measures of success to the work contained in this role?"

We treat our conclusions as hypotheses, our best guesses about candidates. As the search proceeds, we test these hypotheses with increasingly extensive and intensive reference checks—direct conversations with supervisors, peers, and direct reports probing the same questions that we explore with candidates. We then work closely with our client to narrow the pool. We will be prepared to recommend semi-finalists but we prefer that our clients review and discuss all the candidates with us to make an informed choice of semi-finalists. Usually our clients choose to see from four to eight semifinalists in their first-round interviews.

We aid our clients in their preparation for semi-finalist interviews. We review the challenges of the position, as outlined at the start of the search, and discuss how the interviewers can most effectively develop their impressions of each candidate's preparation and suitability for the position. We can provide both written and oral guidance on the interview process, if that is desired.

Selecting Finalists and Checking References

Clients may face a considerable challenge after the semi-finalist round. If it is useful, we can help structure the candidate review, offering both a format for comparison and a series of organized straw votes that facilitate the process of selecting finalists. We are always prepared to offer our opinions and recommendations. However, we believe that these choices belong to our client and we only make recommendations at our client's request.

When finalists are invited back for a second round of interviews, we help to structure the visits, both to provide an opportunity for the candidates to learn more about the organization and the position, and for our client to learn more about each candidate.

As candidates move through their final interviews, we begin an intensive and thorough process of reference checks and background verification on what is now a more select pool of candidates. We believe that references are just as important as, and often more important than, performance in a series of interviews as a means of learning about a candidate's skills, experience, and temperament. We do not solicit letters of reference. Instead, we speak directly with each candidate's supervisors, peers, and direct reports over the course of his or her career, asking questions and eliciting comment on themes similar to those that we explored in our interviews. We document our lengthy reference conversations in a transcript style report and typically provide many pages of commentary on each finalist.

The Final Choice

A good search can be difficult to close. When there are several strong candidates whose strengths and weaknesses are known in detail, making the final choice can be complex. We remain active through this phase of the search, helping our client make a well-informed decision and staying in close contact with the finalists to address their questions and concerns.

We are often asked to play an important role in the final negotiations between the candidate and our client. Although we do not provide legal advice, we can help think through compensation packages and provide advice on relocation and family considerations.

Representative Searches

K-12 EDUCATION AND EDUCATIONAL IMPROVEMENT FROM 2013 TO THE PRESENT

The Accelerated Schools

Los Angeles, CA

Chief Academic Officer

Asia Society

New York, NY

Executive Director of International Studies
Schools Network

The Blake School

Hopkins, MN

Chief Advancement Officer
Chief Financial and Operating Officer

Boston College High School

Dorchester, MA

President

Boston Debate League

Boston, MA

Executive Director

CAST

Peabody, MA

Co-Executive Directors

Charter School Support Services, Inc.

Framingham, MA

Chief Executive Officer

CIEE

Portland, ME

Chief Administrative Officer
Chief Financial Officer
Executive Vice President, International
Exchange Program
Executive Vice President, Study Abroad
Vice President of Academic Exchange Programs

Citizen Schools

Boston, MA

Chief Executive Officer

**Collaborative for Academic, Social and Emotional
Learning (CASEL)**

Chicago, IL

Manager for Assessment and Research

Complete College America

Indianapolis, IN

President

**Council for Accreditation of Counseling and
Related Educational Programs**

Alexandria, VA

President and Chief Executive Officer

The Culver Academies

Culver, IN

Chief Advancement Officer

Cushing Academy

Ashburnham, MA

Chief Financial Officer

Deerfield Academy

Deerfield, MA

Chief Advancement Officer

DSST Public Schools

Denver, CO

Vice President for Development

Duke Ellington School of the Arts

Washington, DC

Chief Executive Officer

Edmund Burke School

Washington, DC

Head of School

Education Development Center

Newton, MA

Director, Leadership for Learning Innovation

The Education Trust*Washington, DC*

President and Chief Executive Officer
Vice President, Higher Education Policy and
Practice

The Episcopal Academy*Newtown Square, PA*

Director of Development

George School*Newtown, PA*

Director of Enrollment Management and
Strategic Initiatives

Girls Preparatory School*Chattanooga, TN*

Assistant Head of School for Development

Greenwich Academy*Greenwich, CT*

Director of Advancement

Groton School*Groton, MA*

Chief Financial Officer

Heising-Simons Foundation*Los Altos, CA*

Early Education Program Officer (2)

The Hill School*Pottstown, PA*

Chief Financial and Operating Officer

The Holdsworth Center*Austin, TX*

President

The Hotchkiss School*Lakeville, CT*

Director of Communications and Marketing

IES Abroad*Chicago, IL*

Executive Vice President for Academic
Programs

The Institute for College Access & Success*Oakland, CA*

President

Institute of International Education*New York, NY*

Chief Philanthropy Officer

Interlochen Center for the Arts*Interlochen, MI*

Associate Vice President of Advancement
Charitable Gift Officer
Director of Development for Interlochen Public
Radio
Executive Dean, Enrollment Management
President
Vice President for Advancement
Vice President for Strategic Communications
and Engagement

Kaufman Music Center*New York, NY*

Executive Director

KnowledgeWorks*Cincinnati, OH*

President and Chief Executive Officer

Massachusetts Charter Public School Association*Hudson, MA*

Executive Director

**The Metropolitan Council for Educational
Opportunity, Inc.***Roxbury, MA*

Chief Executive Officer

Milton Academy*Milton, MA*

Chief Communication Officer
Chief Financial and Operating Officer

Moorestown Friends School*Moorestown, NJ*

Head of School

New York State Education Department*Albany, NY*

Commissioner

NWEA*Portland, OR*

Chief Executive Officer

Ohio Education Association*Columbus, OH*

Executive Director

Partnership for College Completion*Chicago, IL*

Executive Director (Founding)

Philadelphia Academy of School Leaders*Philadelphia, PA*

Executive Director

The Philadelphia School*Philadelphia, PA*

Head of School

Phillips Academy*Andover, MA*

Secretary of the Academy

Phillips Exeter Academy*Exeter, NH*

Chief Financial Officer

Director of Equity and Inclusion

Director of Institutional Advancement

Director of Principal and Major Gifts

Princeton Day School*Princeton, NJ*

Head of Upper School

Springpoint*New York, NY*

Senior Director of School Development

St. Andrew's School*Middletown, DE*

Chief Operating Officer

University of Chicago Laboratory Schools*Chicago, IL*

Director

WestEd*San Francisco, CA*

Chief Administrative Officer

Chief Program Officer

Director, Assessment and Standards
Development Services**William and Flora Hewlett Foundation***Menlo Park, CA*

Director of the Education Program

Education Program Officers (2)

World Education Services*New York, NY*

Deputy Executive Director, Core Services

World Learning*Brattleboro, VT*

President and Chief Executive Officer

WorldTeach*Cambridge, MA*

Executive Director

York Country Day School*York, PA*

Head of School

FEES AND EXPENSES

Professional Fees

Isaacson, Miller works for clients on a retainer basis. Our fee is one-third of the amount that you agree to pay the hired candidate for the first year of employment, including without limitation salary, special deferred executive compensation, signing and performance bonuses, but not including contributions to federally qualified pension plans that are available to all employees, with a minimum fee of \$60,000. We bill our retainer monthly in three equal installments based on an estimate of the cash compensation at the start of the search and make any necessary adjustment at the conclusion of the search. The first retainer is billed at the time the search begins with subsequent billings at 30 and 60 days.

If, during the course of a search, we introduce a person who is hired for another position within 12 months of the closing of the original search, we will bill a separate fee of 25% of the first year's cash compensation.

If you choose to terminate or discontinue our relationship at any time, your obligation to us would be limited to all fees invoiced and all reimbursable expenses incurred through the date of termination. If there is a significant change in the scope of the search or the agreed upon role definition, if the search is placed on hold by you for more than 60 days or if the search has not resulted in a hire within one year of start date, we will consider this contract terminated and a revised contract with adjusted fees, if necessary, will be negotiated. Our fees are non-contingent and non-refundable.

Expenses

We incur two types of reimbursable expenses: direct and indirect. Direct expenses include the direct costs of consultant travel, meals and lodging associated with the interviewing and selection process and with visits to the client. Other direct costs include advertising, videoconferencing, and expenses incurred by candidates (e.g., travel, lodging and meals). Direct expenses are billed separately on the last day of each month. We expect payment within 30 days of billing date.

Indirect expenses are those that are difficult to attribute to a specific project. They include communications, postage and delivery, printing and copying, and research expenses. We charge 11% of the professional fee to cover indirect expenses, and include this in our monthly retainer billing. Original receipts are not available for these expenses.

Guarantee

If you hire a candidate whom we have evaluated and recommended, and if you choose to terminate the person for any reason excepting disability, change of ownership or organizational realignment, or if the person leaves for any reason excepting death or disability, or change of ownership or organizational realignment, within one year from the hired person's employment start date, we will reopen this search and replace the person for no additional professional fee, provided that the new search commences within three (3) months of the employment termination date, unless we mutually agree on a later re-launch date. You will be responsible only for ordinary reimbursable expenses and an additional 11% of the original fee to cover additional indirect expenses.