



# Executive Search Proposal

The Accelerated Schools | Chief Executive Officer

November 21, 2023

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November 21, 2023

Mr. Leonard Rabinowitz  
Board President  
The Accelerated Schools  
116 East Martin Luther King, Jr. Blvd,  
Los Angeles, CA 90011

Submitted via email: [lrabinowitz@accelerated.org](mailto:lrabinowitz@accelerated.org)

Dear Mr. Rabinowitz:

Thank you for inviting Isaacson, Miller (IM) to submit information for your consideration in the search for the next Chief Executive Officer (CEO) of The Accelerated Schools (TAS). We have had the privilege of serving TAS in the past, and we would welcome the chance to partner with you again on this important recruitment. We are confident that our experience and collaborative approach would serve you well.

To briefly introduce our firm: Isaacson, Miller was founded in 1982 and has approximately 270 employees across the country with offices in Boston, Los Angeles, Philadelphia, San Francisco, and Washington, DC. We conduct approximately 500 retained executive searches a year and have completed nearly 9,000 searches throughout our history. Last year, 80% of our searches were for organizations that returned to IM for additional searches after being pleased with our results.

IM has an active and expansive PreK-12 Education practice, and we bring deep experience conducting leadership searches for senior administrators at schools and school systems around the country along with education and youth-oriented nonprofits and funders. We admire TAS' commitment to educating productive, engaged citizens and lifelong learners who are well prepared to succeed in college, career, and life and to involving TAS parents, families, and other civic partners in this critical work. Indeed, it is clear that TAS is a very special place that has been instrumental in transforming its South Los Angeles community.

If selected, our team will work in close partnership with TAS' board, search committee, teachers, staff, students, families, and other key stakeholders to craft a comprehensive and inclusive search process tailored to meet the specific needs of TAS' community at this moment in time. We will listen carefully at the outset and at every step along the way to understand the current needs and aspirations; we will work with the search committee to persuasively articulate and capture in the position profile the skills and experiences most important in TAS' next CEO; and we will prioritize identifying a strong and diverse pool of candidates—with clear mission and pedagogical alignment to TAS—from which you would ultimately select an exceptional new leader for your school community.

This letter and the attached materials provide information about our firm, search process, commitment to equity, diversity, and inclusion, proposed team, relevant experience, and fee structure. You might also refer to [www.imsearch.com](http://www.imsearch.com) for information on some of our current searches and recent placements.

## OUR UNDERSTANDING AND RELEVANT EXPERIENCE

Our [PreK-12 Education practice](#) is well known for the breadth of our expertise and impact. We have concentrated our work on the recruitment of leaders for schools and school systems (charters, independent schools, and traditional publics), innovative education and youth development non-profits of all sizes, national and regional education funders, and education service providers, among others. In addition, IM has the nation's largest and most diverse [practice in Higher Education](#), which includes a strong record leading presidential searches for selective liberal arts colleges as well as recruiting deans of graduate schools of education and senior leaders in student affairs.

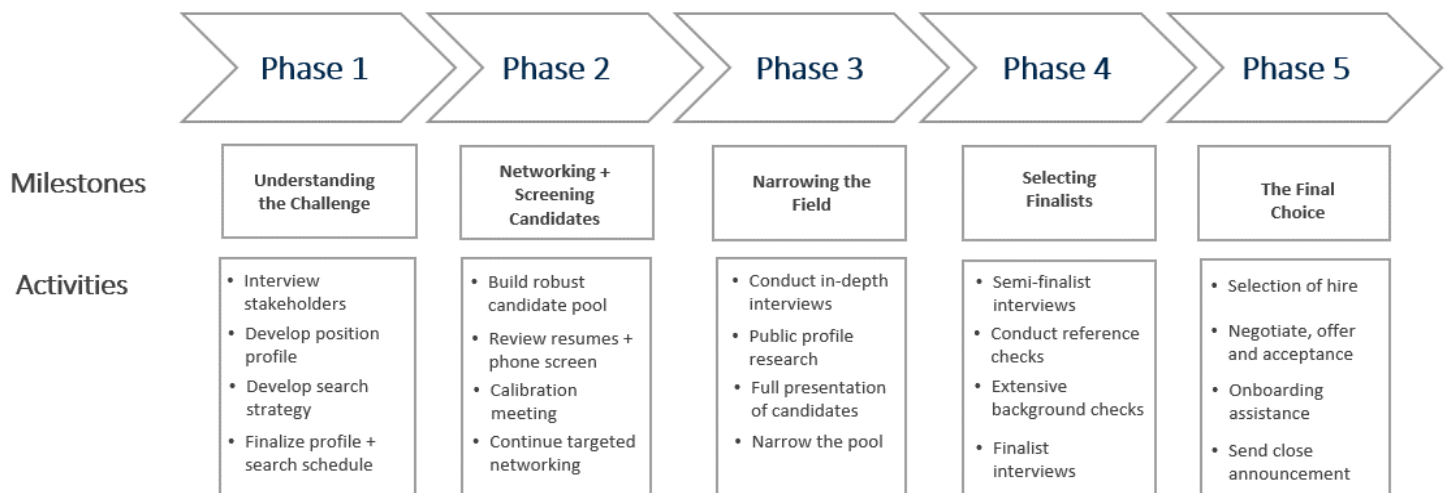
Our broad experience in education at all levels enables us to fully appreciate the complex context in which TAS operates, as well as the professional experience and judgment the best candidates must demonstrate in order to lead the school effectively. We understand the importance of helping you to identify a new CEO who can build on TAS' current strategic priorities and, at the same time, a leader who has the ability to imagine what more might be achievable in the future—and then turn that ambition into reality. We would work closely with you to ensure a thorough and inclusive process; this working partnership will be essential to identifying and selecting the candidate who will best serve TAS' needs and priorities.

We have enclosed a list of our relevant work, and we would also like to highlight the following searches as particularly germane:

- Accelerated Schools | Chief Academic Officer
- Alliance for Excellent Education | Chief Executive Officer; President
- City Year | Chief Executive Officer; Chief Operating Officer; Executive Directors for Greater Boston and New York
- Council of the Great City Schools | Executive Director
- DC Public Charter School Board | Executive Director; Chief Operating Officer; Chief of Staff
- Democrats for Education Reform | Chief Executive Officer; Chief Operating Officer
- The Education Trust-West | Executive Director
- The Education Trust | President and Chief Executive Officer
- Highline Academy | Founding Head of School
- Massachusetts Charter Public School Association | Executive Director
- KIPP Foundation | Chief Development Officer; Chief Financial Officer
- National Charter Collaborative | Chief Executive Officer
- Philadelphia Academy of School Leaders | Executive Director (twice)
- WestEd | Chief Executive Officer; Chief Administrative Officer (twice); Chief Program Officer; Director, Assessment and Standards Development Services; Chief Financial Officer
- National Alliance for Public Charter Schools | President and Chief Executive Officer (*current search*)

## OUR APPROACH TO EXECUTIVE SEARCH

IM provides meticulous and comprehensive client service, delivered by carefully managed, professional teams dedicated to each search. In brief, we utilize a rigorous and collaborative approach that ensures quality and keeps the process on track. We map out a plan and a schedule with you at the beginning of the search and work in partnership with the search committee and board to steward the search to a successful conclusion. Our process is straightforward and includes the following steps:

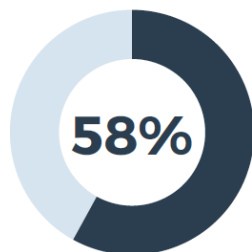


We are recognized for providing extraordinary service throughout this process, with unmatched attention to detail. Clients and candidates alike have commented on our responsiveness and our ability to anticipate their needs and concerns. We build strong working relationships with search committees, believing that the best results occur when our team and the committee share a commitment to rigor and to the search as an elaborate learning process—learning first about the role, then about the universe of possibilities for candidates, and finally learning more about fewer and fewer people. To this last point, we are particularly proud of our referencing process, which we believe is one of the most extensive in the search profession.

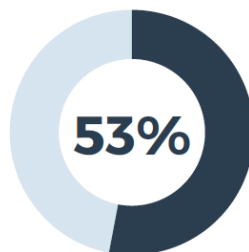
## BUILDING A DEEP AND INCLUSIVE CANDIDATE POOL

IM holds a fundamental institutional commitment to equity, diversity, and inclusion. Over the years, we have strengthened our efforts by expanding our understanding of diversity, which is inclusive of but not limited to race, gender identity, sexual orientation, age, national origin, religion, dis/ability, socioeconomic status, education, marital status, and veteran status. We have become well known for our success in recruiting candidates from traditionally underrepresented backgrounds. In 2022, across all sectors, 59% of our placements identified as women and 38% as people of color. Since we were founded,

47% of our placements have identified as women and 27% as people of color. The following represents placements from 2020 to 2022 in our PreK-12 Education practice area specifically:



Women



People of Color

We have established an extensive network of contacts who share our commitment to diversity, and we call and build upon this network in every search. We work with our clients to uphold legal protections and to resist explicit, as well as implicit, biases that lead to discriminatory hiring practices.

To recruit a candidate pool with leaders from underrepresented and marginalized backgrounds, we have found that the most important success factor is making a significant up-front investment of time to brainstorm, research, and identify a broad and diverse set of potential candidates. Consistent effort, raising diversity in all sourcing conversations, and thinking creatively and expansively about the types of institutions and leadership roles we might consider ensures that our clients are presented with a truly diverse pool of candidates.

We operationalize this commitment to diversity through the assessment of every search at its conclusion and in our annual review process. With every search, IM expands its facility to identify individuals from underrepresented populations and deliver on our clients' commitments to EDI. We also examine candidates' intercultural competency and self-awareness, assessing their track records around EDI in their programmatic work and in their capacity as managers.

#### **PROPOSED TEAM**

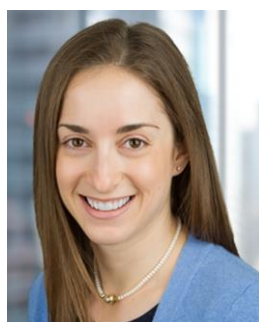
If selected to work with you, we—Katie Rockman and Jaime Morgen—would lead this search on behalf of IM. We would remain engaged in the search from start to finish and would be responsible for both client and candidate management as well as for the overall search process and timeline. We would work with you on all phases of the search, from formulating a clear and compelling case statement, to creating a comprehensive and efficient search strategy, to evaluating candidates and narrowing the pool to a shortlist and, ultimately, an exceptional hire. Our professional biographies are below.

The full IM team would include an associate, who would assist with candidate outreach and serve as project manager; a search coordinator, who would provide scheduling, logistics, and administrative support; a dedicated research specialist, who would participate in ongoing brainstorming sessions with

the team to develop and refine our target list as needed; and a reference specialist to interview those references provided by the candidate and those known to you and to us from our own sources who have worked with the candidate.

In addition, the 100+ recruiters in the firm would be available to contribute ideas and suggestions to the effort. We meet regularly to exchange ideas and discuss current assignments as well as to share relevant learning and improve our craft.

**Katie Rockman | Partner and Practice Leader | Boston, MA**



Katie joined Isaacson, Miller in 2012 and works with a wide range of clients across the preK-16 education landscape, including regional and national education non-profits, schools and school systems, education funders, advocacy and research organizations, and colleges and universities. Her clients also include arts and culture institutions, conservatories and schools of performing arts, and philanthropic organizations across the country. She has conducted numerous presidential and CEO searches, and brings deep experience advising search committees and boards of trustees about these important moments of leadership transition. Katie leads our PreK-12 Education and Education Improvement practice, chairs the firm's Craft Quality and Development Committee, and serves on the firm's Promotions Committee.

Katie's prior work in education gives her first-hand knowledge of successful academic leadership. Before joining Isaacson, Miller, 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 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. Over the last five years, 75% of her placements have been women or people of color. Repeat clients such as City Year, the Carnegie Corporation of New York, New England Conservatory, the Student Conservation Association, and Vanderbilt University speak to her strength in building real and lasting partnerships.

Katie holds a BA from Yale University and an EdM from the Harvard Graduate School of Education.

Jaime Morgen | Managing Associate | San Francisco, CA



Jaime Morgen joined Isaacson, Miller as an Associate in 2019. Based in California, she has enjoyed working on searches across a variety of roles at both public and private institutions of higher education, preK-16 institutions, and other non-profit organizations in the Bay Area.

While in graduate school, she interned at the Harvard Graduate School of Education (HGSE) Admissions Office, managing all digital communication efforts and event coordination. Prior to graduate study, she served as an Assistant Director of Undergraduate Admissions at Tufts University, where she worked with the alumni interviewing program and held the position of managing editor of all print publications.

Jaime also volunteers for both her alma maters; she is an alumni interviewer for Tufts University and assists with local events and new student mentorship for the Harvard Graduate School of Education.

## PROPOSED TIMELINE

In our experience, leadership searches such as this take approximately 20 weeks. The factors most likely to affect the schedule will be the initial discovery phase at the start of the search and the selection phase later on in the process, which includes finalist interviews, selection of the successful candidate, negotiations, and an accepted offer. These activities are affected by the number and range of people that must be included, the size and complexity of the organization, and the organization's prevailing culture and traditions with respect to hiring decisions.

We are flexible in our process and would work with you to develop a timetable that both meets your scheduling requirements and has a high probability of success. We would recommend ten weeks for candidate outreach and networking in order to develop a high-quality, robust pool of candidates with a diversity of backgrounds, profiles, and professional experiences. The remainder of the time required for the search is largely driven by search committee availability, candidate schedules, and whether parts of the search are conducted virtually or in person.

A sample timeline and work plan are enclosed for your review.

## FEE STRUCTURE

IM works for clients on a retainer basis. Our fee is one-third of the hired candidate's total compensation. We also incur two types of reimbursable expenses, which are described in more detail along with our guarantee in the enclosed materials.



## CONCLUDING THOUGHTS

For more than 40 years, IM has formulated, developed, and tested ideas about what makes a strong, visionary, and effective leader and how to run an inclusive process to identify the best match for our clients' needs. We believe that TAS has a distinctive and exciting story to tell, and we would be committed to representing you faithfully and persuasively.

Thank you again for inviting us to submit this information. We look forward to the opportunity to partner with you.

Sincerely,



Katie Rockman | Partner  
617-933-1841 | krockman@IMSearch.com



Jaime Morgen | Managing Associate  
415.655.4925 | jmorgen@imsearch.com

**PRE K-12 EDUCATION + EDUCATION IMPROVEMENT  
SEARCHES 2018 - PRESENT**

**The Accelerated Schools**

Los Angeles, CA

Chief Academic Officer

**Alliance for Excellent Education**

Washington, DC

Chief Executive Officer

**The Athenian School**

Danville, CA

Director of Advancement

**Blue Engine**

New York, NY

Chief Executive Officer

**Boston College High School**

Dorchester, MA

Senior Vice President for Administration,  
Finance and Strategic Planning

**Boston Public Schools**

Roxbury, MA

Superintendent

**Child360**

Los Angeles, CA

Chief Executive Officer

**Children's Literacy Initiative**

Philadelphia, PA

Chief Executive Officer

**City Year**

Boston, MA

Chief Executive Officer

Chief of Staff

Chief Operating Officer

Executive Director, Boston

Executive Director, New York

Senior Vice President, Advancement

Senior Vice President, Education Research &  
Strategy

Senior Vice President, People Experience  
and Culture

Vice President, Major Gifts

**City Year Philadelphia**

Philadelphia, PA

Managing Director of Development

**Complete College America**

Indianapolis, IN

President

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

Alexandria, VA

President and Chief Executive Officer

**Council of the Great City Schools**

Washington, DC

Executive Director

**Cranbrook Educational Community**

Bloomfield Hills, MI

President

**Crossroads School**

Marlborough, MA

President and Chief Executive Officer

**DC Public Charter School Board**

Washington, DC

Chief of Staff

Chief Operating Officer

Executive Director

**Deerfield Academy**

Deerfield, MA

Chief Advancement Officer

**Democrats for Education Reform (DFER)**

New York, NY

Chief Executive Officer

Chief Operating Officer

Massachusetts State Director

Research Director, Texas Chapter

State Director for Washington, DC

**Digital Promise**

Washington, DC

President and Chief Executive Officer

**DSST Public Schools**

Denver, CO

Vice President of Development

**Edmund Burke School**

Washington, DC

Head of School

**The Education Trust**

Washington, DC

Chief Development Officer

**Education Writers Association**

Washington, DC

Executive Director

**Elwyn**

Elwyn, PA

Head of Schools

**Equal Opportunity Schools**

Seattle, WA

Chief Executive Officer

**The Fund for the School District of Philadelphia**

Philadelphia, PA

Chief Executive Officer

**Grantmakers for Education**

Portland, OR

Executive Director

**Greenwich Academy**

Greenwich, CT

Director of Advancement

**Harlem School of the Arts**

New York, NY

President

**Heising-Simons Foundation**

Los Altos, CA

Early Education Program Officer

**High Tech High**

San Diego, CA

Chief Executive Officer

**The Holdsworth Center**

Austin, TX

President

**Holton-Arms School**

Bethesda, MD

Head of School

**The Hotchkiss School**

Lakeville, CT

Associate Head of School

**IES Abroad**

Chicago, IL

Executive Vice President for Academic  
Programs

**Inspired Teaching Demonstration School**

Washington, DC

Head of School

**The Institute for College Access & Success**

Oakland, CA

President

**Institute for Higher Education Policy**

Washington, DC

President

**Ivy Street School**

Brookline, MA

Executive Director

**King School**

Stamford, CT

Chief Financial and Operating Officer

**KIPP Foundation**

New York, NY

Chief Development Officer

Chief Financial Officer

**KnowledgeWorks**

Cincinnati, OH

President and Chief Executive Officer

**Latin School of Chicago**

Chicago, IL

Chief Development Officer

**Massachusetts Charter Public School Association**

Hudson, MA

Chief of Public Affairs

**Mercersburg Academy**

Mercersburg, PA

Chief Financial and Operating Officer

**Milton Academy**

Milton, MA

Chief Communication Officer

Controller

**National Academy Foundation**

New York, NY

Chief Partnership Officer

**National Architectural Accrediting Board**

Washington, DC

Executive Director

**National Center for Teacher Residencies**

Chicago, IL

Chief Executive Officer

**The National Charter Collaborative**

Seattle, WA

Chief Executive Officer

**National Education Association**

Washington, DC

Executive Director

**National Summer Learning Association**

Baltimore, MD

Chief Executive Officer

**The NEA Foundation**

Washington, DC

President and Chief Executive Officer

**New England Conservatory, Preparatory School**

Boston, MA

Director

**Newark Academy**

Livingston, NJ

Chief Advancement Officer

**One8 Foundation**

Boston, MA

Portfolio Manager, Education

**Peggy Browning Fund**

Philadelphia, PA

Executive Director

**Phi Delta Kappa International**

Arlington, VA

Chief Executive Officer

**Philadelphia Academy of School Leaders**

Philadelphia, PA

Executive Director

**Phillips Academy**

Andover, MA

Deputy Head of School for Academics &  
Student Affairs

**Phillips Exeter Academy**

Exeter, NH

Director of Equity and Inclusion

**Punahou School**

Honolulu, HI

Academy Principal

Director for Admissions and Enrollment

Director of Analytics and Planning

**Ransom Everglades School**

Coconut Grove, FL

Director of College Counseling

Executive Director of College Counseling

Head of School

**Riverdale Country School**

Bronx, NY

Head of Upper School

**The Roxbury Latin School**

West Roxbury, MA

Head of School

**Sage Hill School**

Newport Coast, CA

Director of Admission and Financial Aid

**The School District of Philadelphia**

Philadelphia, PA

Superintendent

**Stern Center for Language and Learning**

Williston, VT

President

**Stuart Foundation**

San Francisco, CA

President

**WestEd**

San Francisco, CA

Chief Administrative Officer

Chief Executive Officer

**WIDA**

Madison, WI

Chief Assessment Officer

Chief Educator Learning Officer

Deputy Director

**The Winsor School**

Boston, MA

Director of Strategic Communications

**Wisconsin Center for Education Research**

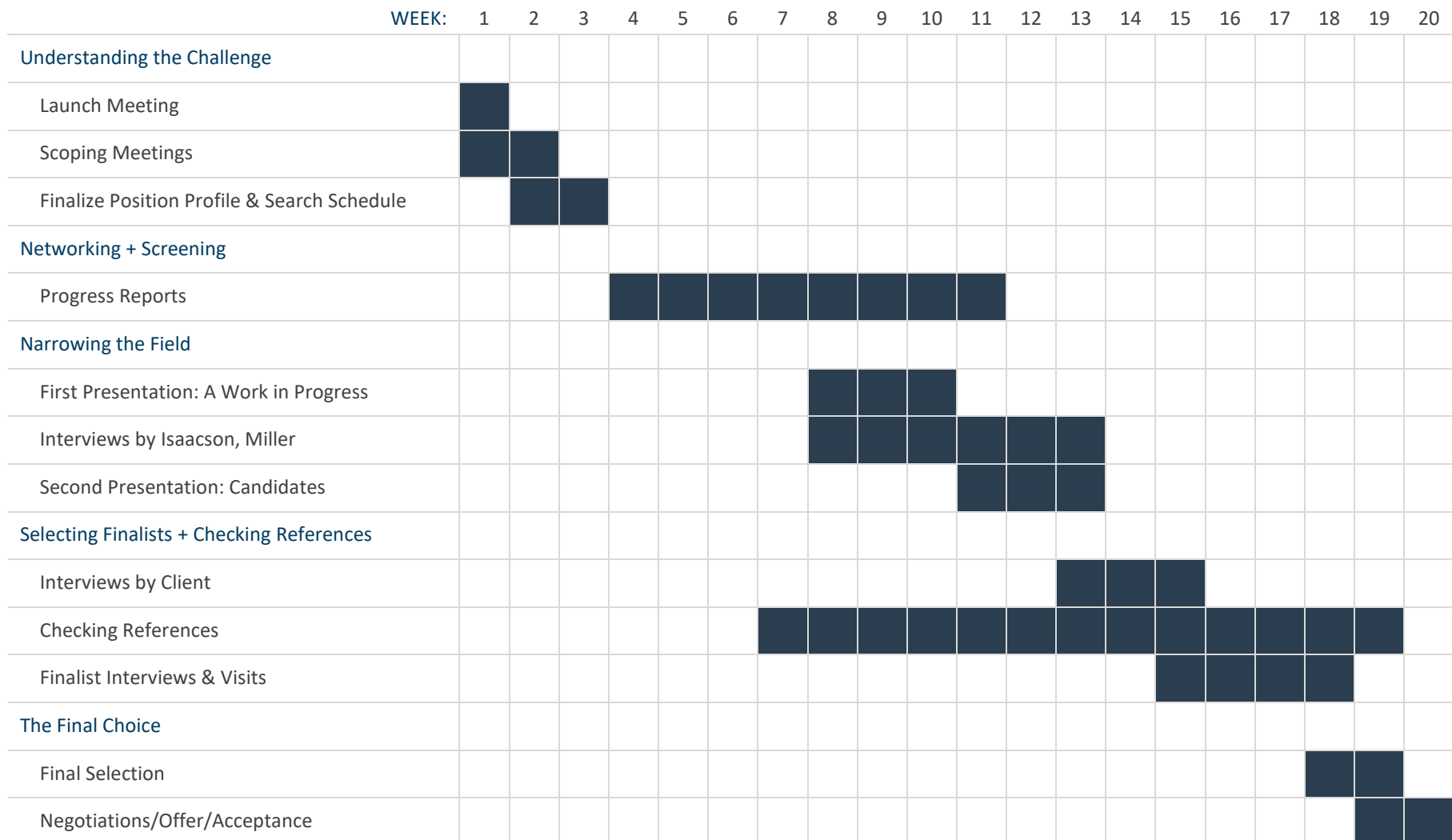
Madison, WI

Chief Operating Officer

Director

## Sample Search Timeline

The following chart illustrates the approximate pace of a typical search. We will develop with you a specific timeline for your search.



## Sample Search Work Plan

Understanding the Challenge	Dates
<p><b>Launch Meeting</b></p> <p>Review search process and timeline. Schedule dates for future meetings. Discuss challenges, opportunities, and objectives. Begin developing a profile of the ideal candidate.</p>	
<p><b>Scoping Meetings</b></p> <p>IM meets with key internal and external stakeholders, as recommended by the client.</p>	
<p><b>Finalize Position Profile and Search Schedule</b></p> <p>Final approval of the public document. Confirm the search schedule. Distribute preliminary lists of applicants + nominees. Solicit suggestions of sources and candidates.</p>	
<b>Networking + Screening of Prospective Candidates</b>	
<p><b>Progress Reports</b></p> <p>Regular reports to the search chair on the progress of the search, input from search committee including additional suggestions of sources + candidates.</p>	
<b>Narrowing the Field</b>	
<p><b>First Presentation   A Work in Progress</b></p> <p>Presentation of active prospects and preliminary candidates to the search committee. This is an opportunity to share insights gleaned from initial networking and to review models for the ideal candidate.</p>	
<p><b>Interviews by Isaacson, Miller</b></p> <p>IM interviews candidates in person and notes impressions and recommendations for search committee in preparation for second presentation.</p>	
<p><b>Second Presentation   Candidates</b></p> <p>Presentation of full candidate pool to the search committee, who decides on pool of candidates to interview.</p>	
<b>Selecting Finalists + Checking References</b>	
<p><b>Semi-finalist Interviews (by Client)</b></p> <p>Search committee interviews candidates and selects finalists. Typically takes two full days.</p>	
<p><b>Checking References</b></p> <p>IM conducts extensive references on each candidate and reports findings to the committee.</p>	
<p><b>Finalist Interviews + Visits</b></p> <p>Client arranges meetings for the finalists with senior staff and a second round of interviews with the search committee (typically 3-4 candidates).</p>	
<b>The Final Choice</b>	
<p><b>Final Selection</b></p> <p>Search committee reviews references, evaluation materials + selects its preferred candidate.</p>	
<p><b>Negotiations, Offer + Acceptance</b></p> <p>IM helps, as appropriate, with the transition of candidate to employee.</p>	

## Fees and Expenses

**Professional Fees** | Isaacson, Miller works for clients on a retainer basis. Our fee for this search is one-third of the hired candidate's first-year earned compensation. Compensation includes salary, special deferred executive compensation, signing and performance bonuses—but not contributions to federally qualified pension plans that are available to all employees. We bill our retainer monthly in three equal installments based on an estimate at the start of the search and make any necessary adjustments at the conclusion. Retainers are billed at the time the search begins and 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 earned 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 advertising and the actual costs of candidate and consultant travel, meals, and lodging associated with the interviewing and selection process and with visits to the client. These expenses are billed separately on the last day of each month and are due within 30 days of billing date.

Indirect expenses cover the administrative support costs to serve our clients well. They include communications and web portal applications, postage and courier deliveries, printing and production, public profile research, references and background checks, and usage of IM's proprietary database Searchlink. We charge 11% of the retainer to cover indirect expenses and include this with the billing of our three retainers. Original receipts are not available for indirect expenses.

**Guarantee** | If you hire a candidate whom we have evaluated and recommended, and, if within one (1) year from the hired person's employment start date, you choose to terminate the person for any reason (excepting disability, change of ownership, or organizational realignment), or the person leaves for any reason (excepting death, disability, change of ownership, or organizational realignment), then we will reopen the 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.