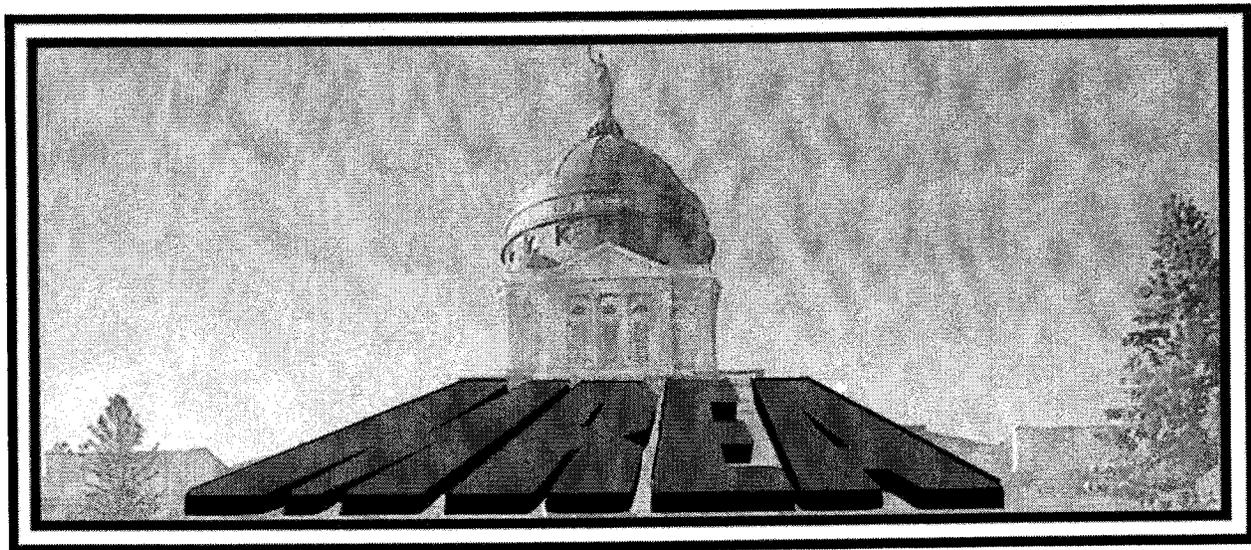


MREA

Superintendent/Administrator Search Services



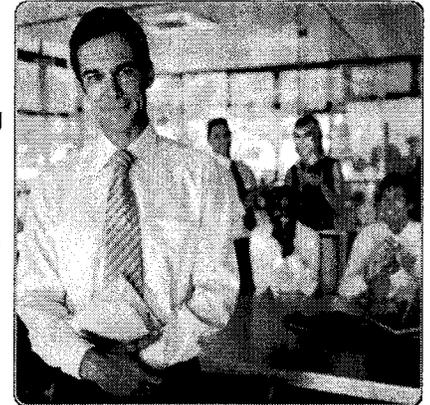
Montana Rural Education Association
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MREA Announces a New Approach to Superintendent/Administrator Recruitment and Search Services In Meeting the Needs of Montana Schools

MREA believes that the recruitment and hiring at the district level of the superintendent and other administrative positions is one of the most important roles of the local Board of Trustees. We believe that many local Boards can and should be conducting their own recruitment and searches, and we believe that they can be highly effective in doing so without the high fees being paid to outside groups, agencies and individuals.

MREA with the assistance of Dr. Rich Shaffer and Montana State University has developed a series of documents and a menu of options to help schools across Montana with this process.

Local School Boards are encouraged to contact MREA's Helena office for free consultation, a complete explanation of the program and an outline of the various services available.



Free Guide Walks the Board Through the Process:

MREA and Dr. Shaffer of MSU have developed a free "how-to" guide which clearly explains the various aspects of an effective recruitment and search process.

Limited Search Management and Facilitation Available (at a fraction of what others charge!):

A variety of management and facilitation services are available to assist Montana Schools.

In some cases, it may be difficult for the local schools to manage the paperwork and communications or to conduct the necessary background checks on their own. MREA can assist with these responsibilities for a fee that is a fraction of what other groups, agencies and individuals are currently charging for this assistance.

On-Site Facilitator/Expert Assistance:

Although MREA believes that local Boards are in the best position to completely conduct their OWN searches, there may be some circumstances where on-site assistance and facilitation is needed. MREA has agreements with a number of highly experienced educators and consultants to help districts requesting this assistance.

All of the above services are available to Montana Schools on a "sliding scale basis" based on the size of the district and the services requested. ...ALL at a fraction of what other groups, agencies and individuals are currently charging! Please contact our Helena office for more details, free consultation, and initial assistance with your employment recruitment and search needs.

MREA wishes to sincerely thank Dr. Rich Shaffer and Montana State University for their invaluable assistance in the development of this guide .

MREA Superintendent/Administrator Search Services

SELECTING YOUR NEXT SUPERINTENDENT IS YOUR JOB, YOUR MOST IMPORTANT JOB, AND YOUR JOB ALONE!! There is certainly nothing wrong with listening to what others have to say, but this is the most important decision that you will make for the children of your district, and this is why you were elected. This is not the decision of the union, or the student council, or the custodial staff, or the clerk.

Community and Staff and the Selection Process

This is a potentially divisive issue. While the Board needs to be sensitive to the needs and desires of staff and community, whatever the role is to be should be clearly laid out in advance. In any case, it should be made clear to the public that (1) this process is controlled by the Board, (2) any input is advisory in nature, and (3) that the final decision rests with the Board.

A few examples of how communities may be involved in the process:

Community meetings convened by the Board to hear what participants are seeking from the new superintendent.

Staff/faculty meetings (for the same reasons).

Informal social gatherings so the public can "size up" the candidates. However, keep them informal so there are no inappropriate questions generated at a formal, Board-arranged function. This is an excellent task for a community group to take on.

DEFINE THE NEEDS, PLAN A SEARCH TIMETABLE

First, determine the needs:

Full time? Principal also? Part time, in combination with a teaching position? Any other duties assigned (Coaching, etc.)? Is there a suitable internal candidate? If not, how broad a search is necessary/practical? (Usually, a statewide search is sufficient as information leaks easily to other areas in this day of the Internet.)

Selection Criteria:

What does the community and staff need and want? What kind of candidate do you seek? Remember, there are only three things you'll get, and you'll likely get those in some proportion, with candidates being stronger in one or two areas and weaker in the other(s):

Traditional "Manager"
Instructional Leader
Politician
Finance or Facilities Expert

You need to decide beforehand what it is you are looking for, AND ONLY YOU COLLECTIVELY AS A BOARD CAN DO THAT. Also, remember that the criteria above will help to create a candidate pool, but the candidate's fit with the community is the ultimate determining factor.

TIMETABLE

Set a timetable: ninety to one hundred days is not extravagant, but the clock IS ticking, and it is likely that the sooner you move, the better.

Suggested Timetable Considerations:

Vacancy posted:	On or about third week in January
Application deadline:	Either "Until Filled" or third week in February
Screen applications:	Last week in February
Interviews:	First week in March
Selection and offer of employment:	End of first week in March
Ratification of selection:	March Board Meeting
Superintendent-elect assumes duties:	July 1, 2___

Questions to consider:

When will first screening of applicants be completed? When will you conduct interviews? Will there be more than one round? When do you want to have a final decision? New position becomes effective July 1, 2___.

ADVERTISING AND RECRUITING FOR THE POSITION

(Advertising and Recruiting are part of the "Limited Search Management Services available from MREA)

Where to advertise?

For statewide searches, suggest the following places to post:

- District website, if there is one.
- School Administrators of Montana website (www.sammt.org), 442-2510.
- Montana Office of Public Instruction website (www.opi.state.mt.us).
- Montana Rural Education Association website (www.mrea-mt.org), 443-2629.
- Largest metropolitan newspaper in your region.

What should the position vacancy announcement contain?

Sample:

POSITION: Superintendent
CONTACT: John Doe, District Clerk
Podunk PS
Box 123
Anywhere, MT 59789
COMM INFO: 406-567-3456; jdoe@podunk.k12.mt.us
DEADLINE: Until Filled
EFFECTIVE: July 1, 2009
APPL REQ: SAP: Instructions Contained in Application Packet
SALARY: \$60,000 minimum, DOQ, DOE, RECORD OF ACCOMPLISHMENT
MISC: **NOTE:** Possible items to consider listing here include health insurance, annual and personal leave, sick leave, housing, utilities, etc. EOE

What deadline (if any) will you set for receipt of application materials?

District choice, but "Until Filled" gives greatest flexibility, in that interviews can be scheduled as superior candidates surface. With an established deadline, Board's hands are tied until application deadline is reached.

Who should candidates contact to receive district application packet?

District Clerk, or MREA: Application packet should contain: Instructions to complete application process. Application materials should include a cover letter, completed district application, current resume', photocopy of current certifi-

cate(s) or explanation if none is available, a minimum of three (3) letters of recommendation, and any other necessary auxiliary materials. Districts should consider either a reference to the district website for candidates, or creating a single page description of your district, its staff, the community, etc. The reason is to best advertise and present your district in a professional manner.

To whom should completed application packets be sent?

District choice, probably district clerk, Presiding Officer of the Board. OR MREA. If the Board opts for our Limited Search Management Services, this person's or group's duty is to safely store application materials until they are opened for first screening.

If District personnel are used for this purpose, MREA cautions that Applications should **NOT** be opened and examined for completeness.

Each candidate should receive from the district a brief note indicating that the application packet has been received.

The Application

The application, should you choose to use one, should require, at a minimum: name and address, educational and employment history, copy of pertinent certificates, listing of candidate accomplishments in previous positions, permission for district to contact all references, and permission for criminal background check if chosen as a finalist.

The reason for a district application is that the district will have a signed document from each applicant attesting to the veracity of all materials submitted. Thus, if something is falsified/misrepresented, there is standing to dismiss or not honor a contract. However, some districts choose not to use an application.

RECRUITING

- Write a brief clear advertisement for the position (sample attached)
- Provide a clear description of what the job requires (job description)**
- Provide district website address (If you have one); if not, compose a one page description of the district.
- Provide honest information about all aspects of the job
- Provide written guidelines for re application and interview procedures--and stick to them.

What is the role of other groups in the process, if any? Will you have a social event?

****NOTE: The basic job description for the superintendent is provided for in Montana law. See 20-4-402, MCA. This description should be included for the district and expanded by Trustees to address the local needs.**

SCREENING APPLICANTS AND SELECTING THOSE TO INTERVIEW

Screening applicants

Who will screen? Who will call references?

The Board should screen applications and call references. Often board members want to contact references not listed in a candidate's application materials. While this practice is common, it should not be undertaken until a candidate becomes a finalist and is announced to the public as such. To do otherwise is not fair to the candidate, who may be just shopping around.

Red flag items to watch for in applications and resumes'

Repeat involuntary separations from employment. Remember that it is very easy to get sideways with a community/board and need to move on. When it happens again and again, it is important to pay attention.

For example, you cannot determine what the candidate was doing from 2001-2003.

Multiple adverse reference reports; the key here is patterns, not single incidents.

Selecting Those to Interview

How many in the interview round? Are you paying expenses for them to come for an interview?

*Suggest interviewees receive, at a minimum: job description, policy manual, prior year budget report

Interviewing Candidates

What should be asked, both of references and candidates? What about an interview instrument? What questions should NOT be asked? How will you conduct the interview? Will there be one or several questioners?

GENERAL INFORMATION REGARDING WHAT TO ASK AND NOT ASK

If you keep one simple rule in mind, you will likely be OK. All questions should be referencing the work, period. Following is a list of things NOT TO ASK:

Age

Questions about age are not permitted.

Birthplace

Questions about a person's birthplace or national origin are not permitted.

Citizenship

Applicants may be asked if they are legally eligible to work in the United States, but if this question is asked of one applicant it must be asked of all applicants. Questions about an applicant's country of citizenship or date U.S. citizenship was acquired are not permitted; neither are inquiries about the citizenship status of an applicant's spouse, parents or children.

Convictions and Arrests

Questions about convictions may be asked if there is a **clear job-related** reason for obtaining the information. If this question is asked of one applicant, it must be asked of all applicants. Inquiries into arrests, rather than convictions, are not permissible.

Disability

It is never permissible to ask applicants if they have a disability or inquire as to the nature of that disability. Questions about applicants' ability to perform specific job functions are permissible or to describe or demonstrate how specific functions would be performed, with or without accommodation. In other words, the focus of the question must be on the ability to perform job duties, not on the disability. If an accommodation is requested because of disability, call HR/AA for specifics on such accommodation. If an applicant with a disability is required to take a pre-employment physical examination, this must be required of all applicants.

Education

It is permissible to ask about academic, vocational or professional schools attended and training received. Questions about the national, racial or religious affiliation of any schools attended are not permitted.

Experience

Questions about work experience, including any volunteer work experience, must be job related. Questions about dates of employment, names, addresses and qualifications of references and reasons for leaving are permitted.

Language Ability

Questions about applicants' skills in oral and written communication or fluency in English or another language are permitted, IF this is a bona fide occupational qualification and has been so indicated on the vacancy announcement.

Marital & Family Status

Questions about an applicant's ability to meet work schedules are permitted, but if asked of one applicant, must be asked of all. Questions about the number or ages of children or an applicant's child care arrangements are not permitted nor are questions about pregnancy or marital status.

Military Service

Questions about dates of service and information on service assignments are permitted if they are job related. Inquiries about type of discharge or about service related disability are not permitted. Information supporting claims of Veteran's Preference is obtained from HR/AA.

Name

Of course applicants must be asked to provide their names, and it is permissible to ask if there is any other name under which the person's previous employment or academic records would be listed. It is never permissible to ask for married/maiden/single name or ask if the applicant wants to be referred to as Ms., Mrs., or Miss. Inquiries about

the national origin of a name, "Is your name Polish." are not permitted.

National Origin or Ancestry

Questions about national origin of the applicant or any family members are not permitted.

Organizations

Inquiries about the name and purpose of professional or academic organizations to which the applicant belongs are permitted as long as the affiliation directly relates to job qualifications. Asking for a list of all organizations to which an applicant belongs is not permitted.

Photograph

Photographs may not be requested under any circumstances. If an applicant includes a photograph, the search secretary should remove the photo from the applicant's file before the application is reviewed.

Race or Color

Questions about an applicant's race or color are never permitted.

Interview Instruments

This is quite often specific to a district. Thus, it's difficult to provide a generic, one-size-fits-all document. The questions should refer to the criteria set by the Board in the initial stage of this process. The most important thing, other than referencing only work related questions, is to develop a set of questions AND ASK ALL THE QUESTIONS TO EVERY CANDIDATE.

Interview Questions and various instruments are also available from MREA as part of the "Limited Management Services"

Possible areas to probe include, but are not limited to:

- Relationship between the Board and the Superintendent
- Candidate's salary and benefit package expectations, or affirmation that advertised package is acceptable
- Communications and public relations skills
- Management expertise
- Community relations
- Educational philosophy
- Professional growth
- Staff relations
- Student relations

When the Board has completed their questions, each candidate should be provided the opportunity to ask questions of the Board. Answer truthfully and completely. There should be no surprises. Listen very carefully. Does the candidate focus solely on self? Are the questions insightful, or superficial? Has the candidate considered ahead of time what questions to ask? Does it appear that the candidate has prepared for the interview?

When the interview is concluding, make your time frame for decision known to each candidate. Request that each candidate carefully consider their own sincerity regarding the possible offer of employment with your district. Inform each candidate that should an offer of employment be made, the district will expect an answer within ____ days.

Contracts

Providing A Contract to the Successful Candidate:

Be prepared to meet with the candidate immediately and discuss contract terms. Utilize a contract format designed specifically for this position. MREA URGES DISTRICTS NOT SIMPLY TAKE A TEACHER CONTRACT AND MODIFY IT. The employment relationship between a superintendent and a district is very complex, is never covered by a collective bargaining agreement, and needs to be specific to protect BOTH the district and the employee.

Board Decision and Offer:

The Presiding Officer of the Board should make the offer. A definite decision-making time frame should be set. For example:

Mr. Smith, the Board of Trustees wishes to offer you employment as our district superintendent. Are you willing to accept the offer?"

If the answer is anything other than "yes", but is not "no", then indicate that you must have a final decision within _____period of time. The suggestion is no more than 24 hours.

Be prepared to move on to your second choice at that time.

Informing the Unsuccessful Candidates:

A rejection letter should be sent to all unsuccessful candidates IMMEDIATELY AFTER A CANDIDATE HAS SIGNED A CONTRACT TO WORK FOR YOUR DISTRICT. The district clerk or secretary should send these letters on district letterhead.

MREA's Member Services

Legal Services – Rich Batterman

With perhaps one of the broadest and most diverse backgrounds and professional experience of any attorney currently serving Montana Schools, Rich Batterman serves as MREA's Chief Legal Counsel as well as provides services directly to our members through our Legal Option Service. Rich is a Montana native having grown up in Glendive, is owner of the Batterman Law Offices located in Baker and Glendive, and also serves as the County Attorney for Fallon and Carter Counties. Rich can be contacted at: Phone 778-3006, E-Mail: rbatterman@midrivers.com



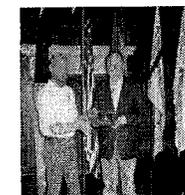
Special Programs Assistance – Dr. Ken Stuker

Dr. Ken Stuker offers assistance to our member districts with the development and maintenance of the Comprehensive Educational Plans, Effectiveness Report requirements, "GASB" accounting requirements and a variety of other state and federal program requirements. Dr. Stuker can be contacted at: Phone: 442-8707, E-Mail: stukers@bresnan.net



E-Rate Services—Jack Sterling

MREA continues to be very proud of sponsoring the invaluable services of Jack Sterling in assisting schools with the entire E-Rate application process. Jack is a very knowledgeable source of information regarding this federal program, and our MREA schools have benefited tremendously from the assistance he has offered through this association service. Please feel free to contact Jack directly at: Phone: 406-259-5399, E-mail: jacks@nemontel.net



Health Insurance and Benefit Services—MUST

MREA is proud to endorse the MUST Insurance programs. We encourage our members to carefully consider the wide range of programs and services available through MUST. Members are encouraged to contact Bob Robinson for more information on MUST options and services. Bob can be contacted at Phone: 447-4401, E-mail: brobinson@ms-sf.org.



Workers' Compensation, Property and Liability Insurance

The Montana Rural Education Association (MREA) is proud to announce a new partnership with Western States Insurance (WSI), Dave Pillatzke and Lynn Mavencamp. Western States Insurance and MREA are a natural alliance as approximately 300 school districts currently depend on WSI for their property and liability insurance needs. This new partnership has been established following Western State's decision to expand service by now offering Workers Compensation Insurance to schools. Dave and Lynn can be contacted at 442-8010, E-Mail: dpillatzke@wsi-insurance.com





MSU – MREA Sponsored Rural Leadership Training

A Graduate Program in Educational Leadership for Prospective Principals and Superintendents, Designed Specifically for the Busy Rural Educator!



Overview

The purpose of this partnership is to encourage a “grow your own” leadership preparation program specifically designed for rural schools. In two academic years (three summers), participants will earn a master’s degree in educational leadership and will qualify for their K-12 principal certificate AND the superintendent certificate. The program will focus on issues and challenges that are unique to rural school leadership. Courses will be offered either online or face-to-face depending on the number of students enrolled. Summer “residency” seminars will be held in conjunction with the Rural Education Conference in June each summer and will be taught by faculty and practitioners who have experience leading rural schools.

Why Should You Participate?

If you are committed to leading a rural school, this program will specifically address issues and concerns that are specific to rural schools. The classes will either be taught online or at a location that is most convenient to the students. Participants will benefit from instruction and mentoring from faculty and practitioners who know and understand the unique challenges of rural education. Teachers may enter the program and start an administrative job as they start their training through participation in the State sponsored Administrative Internship program. MREA member schools can receive a discount in the Internship fee by participating in this program. The courses offered during the academic year are sequenced and have related content. Two courses offered at the same time during each term are offered by the same instructor, have been carefully aligned and have been designed to avoid curricular fragmentation. The curriculum was designed in partnership with MREA’s board of directors to meet the needs of our member schools across the state.

Individual educators or school districts interested in this new innovative program for preparing school leaders should contact either MREA’s Helena office (Phone 406.443.2629, E-mail: dpuyear@mrea-mt.org) OR Dr. Joanne Erickson at MSU (Phone: 406.994.2290, E-mail: jle@montana.edu)

Program of Study

Summer 2009:

EDLD 507 Foundations of Leadership and EDLD 508 Supervision and Teacher Evaluation. These two courses will be offered online starting May 18 and conclude July 31.

Summer Seminar - EDLD 645 Personnel Management. This is a week-long seminar offered at the Rural Education Conference in Billings. The “residency” seminar will start 6/21 and continue through 6/26. The seminar will be offered at the annual Rural Education Conference and will be conducted in conjunction with state and national rural education leaders. The week residency begins with a reception on Sunday evening. The course will build on the content from EDLD 508.

Fall 2009:

EDLD 532 Montana School Law and EDLD 655 Legal and Policy. These two courses will be taught as a seamless sequence or as one continuous class. The focus is to prepare leaders for the legal challenges inherent in today's schools. The content covers required skills and knowledge for both the principal and the superintendent.

Spring 2010:

EDLD 520 School and Community and EDLD 620 School Superintendent. These two courses will be taught as a seamless sequence or as one continuous class. The focus is to prepare leaders to work effectively with their rural community, the parents, and the school board. The content covers required skills and knowledge for both the principal and superintendent.

Summer 2010:

EDLD 555 Montana School Finance and EDLD 515 Planned Change. These two courses will be offered online starting May 18 and conclude July 31.

Summer Seminar – EDLD 650 Finance and Facilities. This is a week-long seminar offered at the Rural Education Conference held annually in June and will be conducted in conjunction with state and national rural education leaders. The week residency begins with a reception on Sunday evening. The course will build on the content from EDLD 555 providing the skill and knowledge a superintendent is required to have in the area of finance and facilities.

Fall 2010:

EDLD 574 Field Experience. This course is designed to provide structured, sustained, standards-based experiences in authentic settings where participants apply learned knowledge and skills in a school leadership environment.

Spring 2011:

EDLD 635 Data Driven Decisions. Participants will learn to apply research –based knowledge, use qualitative and quantitative data, appropriate research methods, technology, information systems and data analysis in school leadership.

Summer 2011:

EDLD 524 and EDLD 525 Instructional Leadership. This course sequence will develop skill and knowledge as an instructional leader. The courses will be offered online May 18 through the end of July.

Summer Seminar - EDLD 580 Rural Leadership Capstone. In this week-long seminar, participants will formalize their leadership philosophy consistent with rural understanding and research. The seminar will be offered at the annual Rural Education Conference in June and will be conducted in conjunction with state and national rural education leaders.

Program Advantages that MREA Urges all Educators and their Schools to Consider:

- ⇒ “Streamlined” Coursework that will greatly save rural educators in the time and expense required to complete the program requirements.
- ⇒ Re-design of the dreaded “statistics” courses with a new, more practical and meaningful coursework focusing on Data Driven Decisions at the local level.
- ⇒ Summer requirements that are scheduled in concert with MREA’s summer educators conference allowing educators to complete this requirement in the relaxed atmosphere of our summer meetings.