

Conestoga Valley School District

Located in Lancaster, PA



June 19, 2026

Executive Search for the Chief Financial and Operations Officer

MISSION

Empowering all students to pursue their goals, strive for personal excellence, and contribute to their communities through access to innovative and rigorous learning opportunities and unwavering support.



June 19, 2026

Dr. Daniel Hartman
Superintendent
Conestoga Valley School District
502 Mt. Sidney Rd.
Lancaster, PA 17602

Dear Dr. Hartman,

I am pleased to present this proposal to partner with the Conestoga Valley School District in conducting an executive search for a Chief Financial and Operations Officer (CFOO). I have valued my partnership with the Board during the superintendent search, and will once again strive to offer a customized, policy driven approach to the process. This proposal outlines my qualifications, scope of services, and pricing.

In identifying the next CFOO for Conestoga Valley, you have my commitment that I will work relentlessly to elevate this opportunity, pursue a strong and diverse candidate pool, and engage leaders who possess the experience, character, and commitment necessary to serve as the next CFOO of Conestoga Valley.

For over 23 years, I have partnered with thousands of school directors and educational leaders, building extensive expertise in public education, executive recruitment, board governance, and organizational leadership. Combined with a strong commitment to supporting school boards, this experience enables me to deliver thoughtful guidance, exceptional service, and a process grounded in integrity, transparency, and results.

Should you wish to meet with me, I would provide additional information outlining each phase of the search. *While this proposal provides a high-level description of the process, the timeline can be appropriately adjusted to meet the needs of the District.* Thank you for the opportunity to potentially support the District in this critical project.

TOM TEMPLETON

VISION

**Setting the standard for learning innovation to
meet the needs of all students, our community, and global society.**



PHASE #1

Search Planning Meeting

WEEK 1

The search begins with a discussion with the Board of School Directors and Dr. Hartman. The purpose of this meeting is to establish all the logistics for the search, including specific dates, times, and locations for various activities. The topics to be addressed in this meeting include, *but are not limited to*:

- Setting up the timeline, calendar of events, and establishing all related protocols.
- Determining the process for handling all candidates (internal and external).
- Developing the competencies and leadership experiences for the next CFOO.
- Collecting information needed to prepare search promotional efforts.
- Distributing the advertising to a defined market and outlining recruiting efforts.
- Collecting, assessing, and developing candidate credential files.
- Collaborating in the selection of first round interview.
- Facilitating all details around the second round interview process.
- Conducting reference and background checks.
- Facilitating the process of selecting the finalist for the position.
- Assisting in negotiating the contract for the next CFOO.
- Announcing the selection and setting up the Entry Plan process.
- Maintaining contact with the District to ensure a smooth first-year transition.
- A comprehensive summary of the search planning meeting will be sent to the Board and Dr. Hartman at the conclusion of this meeting to ensure all expectations are managed and communication channels are established.

PHASE #2

Advertising and Recruiting

WEEK 1 through WEEK 5

Templeton Advantage will tap a deep network of industry contacts when conducting the search. By promoting the position throughout a defined marketplace, this opportunity will receive maximum exposure. Templeton Advantage will also reach out to highly respected educational business leaders who possess the traits the District may be looking for in the next CFOO. If these individuals do not apply, they may provide excellent referrals. Additionally, Templeton Advantage connects with organizations and media outlets to make sure the position is exposed to a diverse pool of candidates. This includes the development of a detailed and persuasive executive briefing that will comprehensively inform and attract candidates to the position.



PHASE #3: Candidate Interviews

WEEK 6 through WEEK 8

After the application period has closed, the Board and Dr. Hartman will review candidate credential files to determine those candidates best positioned for a first-round interview. We will be assessing candidates, in part, against the competencies and leadership experiences outlined in the job posting. The Board and Dr. Hartman will be provided with comprehensive guidance on all aspects of this process, including best practices in interview protocols, the legal parameters surrounding interviews, and specific 'look fors' in candidate answers. First round interviews would likely involve only the Board and Dr. Hartman, primarily because many candidates request confidentiality. In subsequent rounds, the Board has the option of involving other stakeholders in the process. Candidates moving beyond the first round will undergo a more detailed scrutiny of their backgrounds, including comprehensive reference checking, and a more dynamic interview process that may involve candidate presentations, leadership scenarios, and other activities designed to determine a candidate's true fit for the District. Templeton Advantage houses a comprehensive databank of traditional, behavioral, and scenario-based questions that can be customized to Conestoga Valley.

PHASE #4: Background Checks and Hiring

WEEK 9 through WEEK 10

Reference and background checking is one of the most important tasks in the search process. Once an individual moves to the level of a potential finalist for the position, a comprehensive vetting process transpires. Templeton Advantage will facilitate all aspects of this process. Discussions and interviews will be conducted with individuals who have worked with – or have known – the candidate for years. The process for conducting references is structured, objective, and aligned to the specific challenges, issues, and needs facing Conestoga Valley. In addition to traditional reference checking, background work will include internet, social media, and public document searches, news articles, Board meeting minutes, college degrees and university accreditations. All information will be shared with the Board and Dr. Hartman. Templeton Advantage obtains deep insights on any candidate that would be recommended for consideration. When the Board and Dr. Hartman are prepared to offer the position to the selected candidate, this triggers the process of negotiating a contract. Templeton Advantage coordinates all negotiations -- which often includes the district's solicitor and legal representation on behalf of the selected candidate -- to make sure all parties are comfortable with the terms and conditions of employment. All other steps to complete the hiring process will be finalized.



Short List of Executive Searches

List of Searches Conducted since 2014

Camp Hill School District
Delaware County Intermediate Unit
Allegheny Intermediate Unit (2)
Schuylkill Intermediate Unit (2)
Grove City Area School District
Chartiers Valley School District
Shippensburg Area School District
Danville Area School District
Westmont-Hilltop School District
Butler Area School District
Northern Lehigh School District
West York School District
Central York School District
South Western School District
Eastern York School District
Blue Mountain School District (2)
State College Area School District (3)
Crawford Central School District
West Perry School District (3)
Greenwood School District
Shikellamy School District

Millersburg Area School District (3)
Allegheny Valley School District
Mars Area School District
Greater Latrobe School District
Hampton Township School District
South Middleton School District
Pottsville Area School District
Scranton School District
Radnor Township School District
Abington Heights School District
South Fayette School District
Chambersburg Area School District
Norwin School District
Northeastern York School District
Conestoga Valley School District
City of Pottsville – City Administrator
Pottsville Area SD – Business Manager
Lancaster Co CTC – CFOO
Wyoming Valley West – HR Director
Warwick School District

Short List of Additional Districts Served throughout Career

Capital Area Intermediate Unit
Souderton Area School District (2)
Cumberland Valley School District
Avonworth School District
Fox Chapel Area School District
The SD of the City of Erie
Southeast Delco School District
Donegal School District
Elizabeth Forward School District
Kutztown Area School District
Hempfield School District
Iroquois School District

Kennett Consolidated SD
Allentown School District
New Kensington Arnold SD
Millcreek Township School District
North Pocono School District
Reynolds School District
South Allegheny School District
Stroudsburg Area School District
Tuscarora School District
Warren County School District
Warwick School District
Wilson School District



Templeton Advantage, LLC

Board Focused. Student Centered. Community Minded

Why Templeton Advantage Stands Apart

Partnering with Templeton Advantage not only means hiring a search consultant, it also entails engaging a governance strategist deeply invested in the success of your district. The approach will be intentional, purposeful, and highly customized. The most pressing challenge facing districts today is clear: *securing and retaining high-quality teachers and leaders that truly fit your district* — in a time when exceptional candidates are increasingly rare. Below are the qualities that set Templeton Advantage apart.

1. Volume of Candidates

I consistently attract a *high caliber and high volume* of candidates. My networking skills, promotional efforts, and overall credibility draw in both experienced leaders and aspiring candidates who might not otherwise apply.

2. Total Immersion

Before I ever design your search, I study everything about your district, from the comprehensive plan to the budget and important educational initiatives. I immerse myself in leadership literature and make every attempt to listen to qualified voices.

3. Extensive Experience — Tested and Proven

My experience working with school boards is both broad, deep, and tested. I've partnered with districts and organizations as varied as the Lancaster County Career and Technology Center, the City of Pottsville, Scranton, State College, Erie, Radnor Township and the Allegheny Intermediate Unit -- each with its own unique dynamics and challenges. Through tens of thousands of interactions with board members and administrators, I've built a toolkit of strategies that I bring to every search I conduct.

4. Intensive Customization

Every district has its own culture, challenges, and aspirations — and my process reflects that. Every component is tailored to ensure a candidate's *fit* with your district's specific needs, standards, and values.



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5. Strategic Outreach and Recruitment

I don't simply wait for candidates to apply; I make every effort to find them. My outreach is proactive, personal, and appropriately persistent. I leverage a vast professional network to identify and recruit leaders who align with your priorities, even if they weren't initially looking for a move. If they are not interested, they sometimes refer me to other qualified candidates.

6. Communication, Communication, Communication

From start to finish, I make sure everyone is informed, engaged, and confident in the process. Expect communication that is clear, concise, and meaningful — whether it's progress updates, candidate insights, or guidance on governance and leadership best practices. Transparency builds trust, and trust drives success.

7. Exceptional Service

Responsiveness and follow-through are cornerstones of my work. I take pride in being available, proactive, and fully invested — ensuring that issues are addressed swiftly and that the process is smooth, professional, and productive at every step.

8. Consensus Building

Executive searches often surface differing perspectives — that is both healthy and frustrating. My role is to guide those discussions productively, helping the hiring team find common ground through skilled facilitation and a steady focus on shared goals.

9. Discernment

I bring a disciplined eye to candidate evaluation. From résumés and references to temperament, communication style, and leadership presence, I analyze each candidate with objectivity and insight. My goal is to help you see beyond credentials to the *character* and *capacity* that will make a leader truly thrive in your district.

10. Peace of Mind -- At the end of the day, what I offer is confidence — the peace of mind that comes from knowing your search is conducted with integrity, rigor, and care.



Education and Experience

Templeton Advantage, LLC

Founder and Creative Director

FEB 2014 – Present

- Experience collaborating with thousands of educational leaders.
- Highly effective small and large-group facilitation, coaching, and training skills.
- Persuasive writer, speaker and presenter at conferences and workshops.
- Educated at Millersville University, PSU Harrisburg, and HACC.

Pennsylvania School Boards Association

Assistant Executive Director for

School Board and Management Services

Director, School Personnel Services

School Personnel Services Representative

MAY 2009 – NOV 2013

MAY 2005 – APR 2009

MAR 2003 – MAY 2005

- Oversaw over 20 staff in four core service areas, w/four direct reports.
- Oversaw a budget of over \$1 million with revenues derived from services (policy, Board training, administrative searches, compensation studies, negotiations services).
- Served on Task Force for the development, implementation, and revision of PSBA's Standards for Effective School Governance and the Code of Conduct for School Boards.
- Regularly presented on leadership topics such as goal setting, Board-superintendent relations, school culture, and superintendent evaluations.
- Collaborated with other assistant executive directors to coordinate and market statewide conferences that featured national figures.
- Worked with a team of school directors on PSBA's Master School Board Member and Distinguished School Board accreditation programs.
- Served on several task forces involving internal staff and external stakeholders on topics such as Labor Relations, PSBA's Core Values, and Strategic Planning.
- Directed the development of division products and services, including administrator searches, compensation studies, and employee relations/negotiations.
- Wrote articles for publications on educational issues and collective bargaining trends.
- Analyzed collective bargaining agreements for districts and PSBA's research efforts.

U.S. Representative George W. Gekas

District Director and Congressional Aide

JAN 1989 – DEC 2002

- Assigned and evaluated the work of five caseworkers in three district offices.
- Represented the Congressman at meetings throughout the district.
- Organized events on trade, transportation, energy, agriculture, and veterans issues.
- Managed nomination process for HS students pursuing military academies.
- Acted as liaison between constituents and federal, state, and local agencies.



Cost and Fees

The total cost to conduct all phases of the search outlined in this proposal is **\$12,000**, plus travel and printing expenses.

This fee is due in four installments:

- 25% will be invoiced shortly after execution of the contract.
- 25% will be invoiced after completion of recruiting phase.
- 25% after all interviews have been conducted.
- 25% after candidate has been appointed.
- *Final expenses will be invoiced after post search services are completed.*

Travel expenses will be limited to mileage reimbursement based on current IRS guidelines. There will be no reimbursement for meals or lodging. **Templeton Advantage** follows all applicable statutory and relevant Board policies.

If the CFOO departs within one year from his/her start date for any reason, **Templeton Advantage** will conduct the search again at no cost, except for travel, printing, and (potentially) advertising expenses

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