

Original Message -----

From: "Aronsohn, Kathryn" <kathryn.aronsohn@fmr.com>  
To: [REDACTED]@earthlink.net>  
Sent: Monday, November 22, 2010 7:00 PM  
Subject: Meeting with ETS

Hi Stan,

Thanks for taking my call today. The three people we would like to set you up with (and it may change based on availability) are John Oswald, George Powell and Steve Lazer. There may be others as well. Could you take a look at your calendar in the upcoming weeks to see when you are free to take a day for travel and meetings?

Best,  
Kat

---

Kat Aronsohn | J. Robert Scott  
Assistant to Jonathan Fortescue, Ph.D.  
260 Franklin Street, Suite 620  
Boston, MA 02110  
Phone: +1 (617) [REDACTED]  
kathryn.aronsohn@fmr.com  
www.jrscott.com

To: Aronsohn, Kathryn  
Subject: Re: Meeting with ETS

Hi Kat...

I just wanted to let you know that I'll be on the road starting Monday and going through the week. The best way to make contact would be to use my office e-mail address at stan.heffner@ode.state.oh.us or call my Blackberry at 614-██████████

I hope you had a great Thanksgiving.

Stan

----- Original Message -----

From: "Aronsohn, Kathryn" <kathryn.aronsohn@fmr.com>  
To: "STAN HEFFNER" ██████████@earthlink.net>  
Sent: Tuesday, November 23, 2010 6:17 PM  
Subject: RE: Meeting with ETS

Hi Stan,

I'm going to try my best to make it for Dec. 17 in Princeton, NJ. I'll be back in touch...

Best,  
Kat

-----Original Message-----

From: STAN HEFFNER [mailto:██████████@earthlink.net]  
Sent: Monday, November 22, 2010 7:24 PM  
To: Aronsohn, Kathryn  
Cc: ██████████  
Subject: Re: Meeting with ETS

Hi Kat:

It was good talking with you today. I appreciate your interest and look forward to continuing our conversations.

My calendar each month tends to fill about six weeks out. In checking what I think I could move and assuming that we would meet in Princeton, NJ, I would propose the dates of December 17, 21, 22 or 23. I know that you were interested in meeting before Christmas, but if none of these dates look promising please let me know and I can send dates for later in 2010 or in early January.

I look forward to hearing from you so that plans can be made to accommodate a meeting. Thanks!

Stan

Would you be able to get to Princeton on Dec. 16, the night before? ETS would like to start at 8/8:30am. Not sure where you are coming from but there is a 7:12pm Delta flight from Columbus to Newark that arrives at 9pm. Let me know if that is feasible for you. (also, we will provide car service to and from the airport)

Best,  
Kat

-----Original Message-----

From: STAN HEFFNER [mailto: [REDACTED]@earthlink.net]  
Sent: Saturday, November 27, 2010 4:23 PM  
To: Aronsohn, Kathryn  
Subject: Re: Meeting with ETS

Hi Kat...

I just wanted to let you know that I'll be on the road starting Monday and going through the week. The best way to make contact would be to use my office e-mail address at stan.heffner@ode.state.oh.us or call my Blackberry at 614-[REDACTED]

I hope you had a great Thanksgiving.

Stan

----- Original Message -----

From: "Aronsohn, Kathryn" <kathryn.aronsohn@fmr.com>  
To: "STAN HEFFNER" < [REDACTED]@earthlink.net >  
Sent: Tuesday, November 23, 2010 6:17 PM  
Subject: RE: Meeting with ETS

Hi Stan,

I'm going to try my best to make it for Dec. 17 in Princeton, NJ. I'll be back in touch...

Best,  
Kat

-----Original Message-----

From: STAN HEFFNER [mailto: [REDACTED]@earthlink.net]  
Sent: Monday, November 22, 2010 7:24 PM  
To: Aronsohn, Kathryn  
Cc: [REDACTED]  
Subject: Re: Meeting with ETS

Hi Kat:

It was good talking with you today. I appreciate your interest and look forward to continuing our conversations.

Subject: RE: Meeting with ETS

it,

I have blocked Stan's calendar for the afternoon of Dec. 16 and all day Dec. 17. Please let me know what you need from me and I will help make this happen.

-----Original Message-----

From: Heffner, Stan  
Sent: Monday, November 29, 2010 12:00 PM  
To: Aronsohn, Kathryn  
Cc: [REDACTED]  
Subject: RE: Meeting with ETS

Hi Kat:

Your message is timely as I'm soon departing the office for Washington, DC. I've copied [REDACTED] so that she can work with you to confirm that I could arrive the evening of December 16 and be available as long on December 17 as you would like. She can then make any travel arrangements, unless you prefer to do that internally.

If you haven't gotten a resume yet, I'm also asking that [REDACTED] send you one (not yet fully updated, but I hope it would be acceptable).

Thanks! I look forward to meeting everyone.

Stan

-----Original Message-----

From: Aronsohn, Kathryn [mailto:kathryn.aronsohn@fmr.com]  
Sent: Monday, November 29, 2010 11:48 AM  
To: Heffner, Stan  
Subject: RE: Meeting with ETS

Hi Stan,

Would you be able to get to Princeton on Dec. 16, the night before? ETS would like to start at 8/8:30am. Not sure where you are coming from but there is a 7:12pm Delta flight from Columbus to Newark that arrives at 9pm. Let me know if that is feasible for you. (also, we will provide car service to and from the airport)

Best,  
Kat

-----Original Message-----

From: STAN HEFFNER [mailto:[REDACTED]@earthlink.net]  
Sent: Saturday, November 27, 2010 4:23 PM

## -----Original Message-----

From: Aronsohn, Kathryn [mailto:kathryn.aronsohn@fmr.com]  
Sent: Friday, December 03, 2010 4:22 PM  
To: [REDACTED]  
Subject: RE: Meeting with ETS

Hi [REDACTED],

I'm still not yet sure of the exact order of Stan's meetings on the 17th, but I know enough to book his flights. I would like to book him on a 7:12pm flight from Columbus that arrives at 9pm on the 16th. Then back on the 17th on a 4:35pm flight back to Columbus at 6:37pm. I will get him a hotel and car service as well. Can you confirm that these flights will work for him? Also, I will need his birthdate and full name as it appears on the photo ID he takes to the airport. If he has Continental or United numbers that would be helpful as well.

I think the final schedule should be ready on Monday, and I can forward it along with at the necessary information as bios on the people he will meet.

Cheers,  
Kat

## -----Original Message-----

From: [REDACTED] [mailto:[REDACTED]@ode.state.oh.us]  
Sent: Friday, December 03, 2010 8:17 AM  
To: Aronsohn, Kathryn  
Subject: RE: Meeting with ETS

Thanks for the update. I look forward to hearing from you.

## -----Original Message-----

From: Aronsohn, Kathryn [mailto:kathryn.aronsohn@fmr.com]  
Sent: Thursday, December 02, 2010 5:22 PM  
To: [REDACTED]  
Subject: RE: Meeting with ETS

Hi [REDACTED],

I'm expecting to have a concrete schedule tomorrow, and I will be in touch.

Cheers,  
Kat

## -----Original Message-----

From: [REDACTED] [mailto:[REDACTED]@ode.state.oh.us]  
Sent: Tuesday, November 30, 2010 2:54 PM  
To: Aronsohn, Kathryn

[REDACTED]

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**From:** Aronsohn, Kathryn <kathryn.aronsohn@fmr.com>  
**Sent:** Thursday, December 09, 2010 5:46 PM  
**To:** [REDACTED]  
**Subject:** RE: Meeting with ETS  
**Attachments:** Heffner\_Stan\_91805 12-16-10.pdf

Hi [REDACTED],

Attached is a first draft itinerary for Stan. More people may be added next week, i.e., Walt MacDonald, and I included his bio anyway. This should give Stan a good sense of his day on the 17th and I'll pass along any updates as I receive them. Please let me know if you have any questions.

Best,  
Kat

---

Kat Aronsohn | J. Robert Scott  
Assistant to Jonathan Fortescue, Ph.D.  
260 Franklin Street, Suite 620  
Boston, MA 02110  
Phone: +1 (617) [REDACTED]  
kathryn.aronsohn@fmr.com  
www.jrscott.com

-----Original Message-----

**From:** [REDACTED] [mailto:[REDACTED]@ode.state.oh.us]  
**Sent:** Monday, December 06, 2010 11:49 AM  
**To:** Aronsohn, Kathryn  
**Subject:** RE: Meeting with ETS

Good Morning Kat,

The suggested times are perfect. I have listed below the information needed for the flight.

Stanley W. Heffner  
7-13-52

If you need an emergency contact, feel free to use

[REDACTED]  
614 [REDACTED]

Thanks!  
[REDACTED]

[REDACTED]

---

**From:** [REDACTED]  
**Sent:** Friday, December 10, 2010 10:01 AM  
**To:** Aronsohn, Kathryn  
**Subject:** RE: Meeting with ETS

I shared this with Stan and he didn't seem to have any questions at this time.

Thank you,  
[REDACTED]

-----Original Message-----

**From:** Aronsohn, Kathryn [mailto:kathryn.aronsohn@fmr.com]  
**Sent:** Thursday, December 09, 2010 5:46 PM  
**To:** [REDACTED]  
**Subject:** RE: Meeting with ETS

Hi [REDACTED],

Attached is a first draft itinerary for Stan. More people may be added next week, i.e., Walt MacDonald, and I included his bio anyway. This should give Stan a good sense of his day on the 17th and I'll pass along any updates as I receive them. Please let me know if you have any questions.

Best,  
Kat

---

Kat Aronsohn | J. Robert Scott  
Assistant to Jonathan Fortescue, Ph.D.  
260 Franklin Street, Suite 620  
Boston, MA 02110  
Phone: +1 (617) [REDACTED]  
kathryn.aronsohn@fmr.com  
www.jrscott.com

-----Original Message-----

**From:** [REDACTED] [mailto:[REDACTED]@ode.state.oh.us]  
**Sent:** Monday, December 06, 2010 11:49 AM  
**To:** Aronsohn, Kathryn  
**Subject:** RE: Meeting with ETS

Good Morning Kat,

The suggested times are perfect. I have listed below the information needed for the flight.

**NotUsed**

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**From:** Fortescue, Jonathan [jonathan.fortescue@fmr.com]  
**Sent:** Friday, March 25, 2011 4:35 PM  
**To:** Oswald, John; Attaway, Claude R  
**Cc:** Lazer, Stephen; Elliott, T.J.  
**Subject:** Stan Heffner Offer

**Importance:** High

Dear All,

I spoke at great length with Stan Heffner today. This was the second conversation. He said that ETS is tied for first place in his mind as he also considers another potential opportunity, which is to serve as the State Superintendent in Ohio. (He hasn't yet been offered this position but will learn this coming Tuesday. If not offered to him, he will definitely come to ETS.)

The ETS opportunity has strongly intrigued him. He is willing to re-locate to California. He also agrees that we are close on the terms of the deal (currently as base salary=\$180K + STIC). One possible hitch is that he needs to sort out his state pension. He is 3 years shy of vesting 30 years and is meeting with an official this coming Wednesday to determine the cost of buying out those three years.

I write you all because I think he is recruitable. Our offer dropped somewhat out of the air after he'd given up hope that he'd get one from us. And now, on the cusp of realizing a career goal of being a state superintendent, he needs to decide between that and ETS. His tone when he speaks about ETS is brighter than when he speaks about the state position. He is uncertain if he will enjoy the party-line politics that are at play in Ohio. It feels to me that a recruiting call or two from ETS might tip things our way, regardless of any other offer.

He will be at a decision point by next Wednesday. However, I think getting to him by Monday, in advance of Tuesday's meeting, would be good. I asked for his mobile number which he gave me. It is: (614) [REDACTED]. At the very least, I would encourage John to give him a call. But you all may want to discuss a 1-2 punch. Let's win this one.

Talking points: He enjoyed the intellectual nature of his conversations with ETS. He likes the emphasis on quality and appreciated the sense of team-play and collegiality at ETS. ETS would also allow him to enrich and diversify his professional experience and to work across multiple state settings. I also emphasized that your commitment was sincere as it relates to the shape of the rest of his career. (You may add others as you see fit.)

Let me know if you need anything else. I am off next week to ski the slopes of Jackson Hole but will be available by email and mobile: 617-9 [REDACTED]

Best,

Jonathan

Jonathan Fortescue, Ph.D.  
Managing Director  
J. Robert Scott Executive Search  
260 Franklin Street, Suite 620  
Boston MA 02110  
O: 617-563-2770  
V: 617- [REDACTED]  
[jonathan.fortescue@fmr.com](mailto:jonathan.fortescue@fmr.com)  
[www.j-robert-scott.com](http://www.j-robert-scott.com)

The ETS opportunity has strongly intrigued him. He is willing to re-locate to California. He also agrees that we are close on the terms of the deal (currently as base salary=\$180K + STIC). One possible hitch is that he needs to sort out his state pension. He is 3 years shy of vesting 30 years and is meeting with an official this coming Wednesday to determine the cost of buying out those three years.

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Let me know if you need anything else. I am off next week to ski the slopes of Jackson Hole but will be available by email and mobile: 617-[REDACTED].

Best,

Jonathan

Jonathan Fortescue, Ph.D.

Managing Director

J. Robert Scott Executive Search

260 Franklin Street, Suite 620

Boston MA 02110

O: 617-563-2770

**NotUsed**

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**From:** Elliott, T.J.  
**Sent:** Saturday, March 26, 2011 9:18 PM  
**To:** Oswald, John; jonathan.fortescue@fmr.com  
**Cc:** Lazer, Stephen; Attaway, Claude R  
**Subject:** Re: Ohio Situation

Great news. Thanks for the update,

T.J.

---

**From:** Oswald, John  
**To:** Fortescue, Jonathan <jonathan.fortescue@fmr.com>  
**Cc:** Lazer, Stephen; Attaway, Claude R; Elliott, T.J.  
**Sent:** Sat Mar 26 18:04:06 2011  
**Subject:** RE: Ohio Situation

Thanks, Jonathan. This is good news!

I will still call Stan Monday. I think this could work if Stan signs a letter committing to letting us write him into our SBAC proposal in April.

Regards,  
John

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**From:** Fortescue, Jonathan [mailto:jonathan.fortescue@fmr.com]  
**Sent:** Saturday, March 26, 2011 5:22 PM  
**To:** Oswald, John  
**Subject:** Fw: Ohio Situation

Fyi

Jonathan Fortescue, Ph.D.  
Managing Director  
J Robert Scott Executive Search  
(Sent from a Wireless Device)

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**From:** STAN HEFFNER [mailto: ]  
**Sent:** Saturday, March 26, 2011 04:52 PM  
**To:** Fortescue, Jonathan  
**Subject:** Re: Ohio Situation

Thank you, Jonathan. Please convey that I did think long and hard about this offer, and I am looking forward to joining the ETS team.

Stan

----- Original Message -----

**From:** Fortescue, Jonathan  
**To:** @earthlink.net  
**Sent:** Saturday, March 26, 2011 4:29 PM  
**Subject:** Re: Ohio Situation