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PALM BEACH COUNTY, FLORIDA

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MICHAEL J. BURKE, SUPERINTENDENT

MEMORANDUM

TO: Honorable Chair and Members of the School Board
Michael J. Burke, Superintendent
Chair and Members of the Audit Committee

FROM: Teresa Michael, Inspector General *TM*

DATE: 7/7/2022

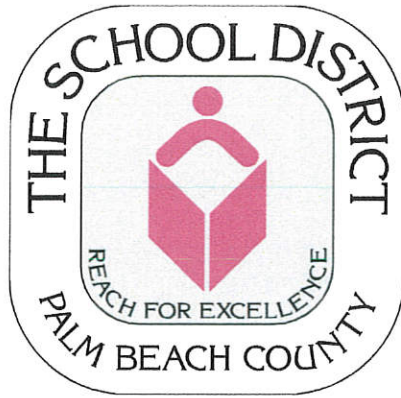
SUBJECT: Transmittal of Final Investigative Report:
22-0004-I/Educational Technology

Attached please find a copy of the Palm Beach County School District Office of Inspector General (OIG) Final Report of OIG Case 22-0004-I related to the Educational Technology department. On October 20, 2021, the Office of Inspector General (OIG) received a complaint from Chief Academic Officer Dr. Glenda Sheffield regarding three Educational Technology employees. Specifically, Allegation 1 was that Director of Technology David Atwell and Manager of Instructional Technology Kim Culp solicited sponsorship from District-approved vendor SRG Technology, LLC. Allegation 2 was that Technology Program Specialist Jonathan Decker solicited sponsorship from District-approved vendor SRG Technology, LLC.

The OIG investigation concluded that Allegation 1 was **unsubstantiated**.
The OIG investigation concluded that Allegation 2 was **substantiated**.

In accordance with *School Board Policy 1.092.9.b.iv.*, on May 13, 2022, the draft of this investigation was provided to Jonathan Decker for a response. As of June 20, 2022, the OIG did not receive a written response from Jonathan Decker.

The findings of this report were referred to the Office of Professional Standards for action deemed appropriate.



OIG CASE NUMBER 22-0004-I

Educational Technology Appearances of Impropriety

TYPE OF REPORT: FINAL

DATE OF REPORT: 7/7/2022



Teresa Michael

**Teresa Michael, Inspector General
Office of Inspector General
School District of Palm Beach County**

Office of Inspector General

Report of Investigation 22-0004-I

EXECUTIVE SUMMARY

From October 26, 2021, to March 1, 2022, the OIG conducted interviews with relevant staff members, and District-approved vendors and reviewed District email records, Request for Proposals (RFP), PeopleSoft records, and other relevant material as they related to the Allegation.

As a result of the investigation, OIG staff determined the allegation that the Director of Technology David Atwell and Manager of Instructional Technology Kim Culp violated School Board Policies 3.02.4.g. 3.02.5.d.ii and 3.02.5.e.viii (Code of Ethics) by soliciting sponsorships from District approved vendor SRG Technology, LLC for the IMS Global K-12 Leadership Retreat gave rise to the appearances of impropriety was **Unsubstantiated**.

The allegation that Technology Program Specialist Jonathan Decker violated School Board Policy 3.02.4.g. and 3.02.5.e.viii -Code of Ethics by soliciting sponsorships from District-approved vendor SRG Technology, LLC for the IMS Global K-12 Leadership Retreat gave rise to the appearances of impropriety was **Substantiated**.

On May 13, 2022, the OIG forwarded a copy of the draft report to Jonathan Decker and was given 20 business days to respond in writing. At the finalization of this investigative report, the OIG did not receive a response from Jonathan Decker.

RECOMMENDATIONS

OIG recommends:

- Dr. Glenda Sheffield reviews all contracts for the department to verify if they may include any travel benefits. For example, if the contract or subscription includes travel to seminars for District employees.
- The department ensure the \$2000 is returned to the vendor if it has not been done so.
- The findings of this report are referred to the Director of Professional Standards Vicki Evans-Paré for review and action deemed appropriate.

INVESTIGATIVE PREDICATE

On October 11, 2021, Director of Investigations Oscar Restrepo received an email from Deputy General Counsel Blair Littlejohn regarding two events that were to be sponsored by District approved vendors. The trips were to Denver, Colorado, and Rosemary, Florida. The OIG was asked to investigate and determine if David Atwell, Jonathan Decker, and Kim Culp violated District policy by accepting a company-sponsored trip from District approved vendor SRG Technology, LLC to attend an IMS Global K-12 Leadership Retreat in Denver, CO in November 2021.

On October 20, 2021, OIG Investigator Tanya Lawson was assigned this complaint for investigation.

The OIG investigation concluded that part one of the Allegation was unsubstantiated. Part two of the Allegation was substantiated. The investigative findings of the allegation will be discussed in detail later in this report.

BACKGROUND

Educational Technology provides schools with a technology-rich teaching and learning environment. Educational Technology serves students, teachers, and administrators by ensuring efficacy and ease of use for technology-based instructional applications and tools.

Programs and applications, we oversee include the SMART Learning Suite, Teaching with Technology Trailblazers, Google Workspace including Google Classroom, Technology Conference, i-Ready, Blender, Adobe Connect, interactive classroom, Reading Counts, Clever, BrainPOP, online textbooks, integrating Apple tools for instruction, Adobe Creative Suite, middle school grade/course recovery through Edgenuity, and the Google Certified Educator program. Technology Conference, i-Ready, Blender, Adobe Connect, interactive classroom, Reading Counts, Clever, BrainPop, online textbooks, integrating Apple tools for instruction, Adobe Creative Suite, middle school grade/course recovery through Edgenuity, and the Google Certified Educator program.¹

SRG Technology, LLC (SRG, SRG Technology)

SRG Technology, LLC (SRG) is located at 330 SW 2nd Street, Fort Lauderdale, FL 33312. SRG is the developer, designer, and provider of Blender products such as BlenderLearn (Blender). BlenderLearn applications connect all stakeholders, foster collaboration, maximize resources, minimize hassles, save time and together, provide a comprehensive, integrated, easy-to-use, one-stop to really move the needle in education

¹Source: https://www.palmbeachschools.org/departments/educational_technology

with innovative concepts and rich user experiences.² BlenderLearn is an ecosystem of innovative applications designed to drive student, teacher, and school improvements by facilitating and promoting personalized teaching and learning. SRG received its first contract with the District in 2014. SRG replaced the defunct Riverdeep Learning Village with its program; Blender (aka BlenderLearn). SRG sponsored Decker and Culp.

IMS³ Global Conference (IMS, IMS Global)

IMS has a community-governed testing program that enables products to be certified compliant with specific IMS standards and features of the standards. For technology suppliers, participation in the IMS certification process is the fastest and most cost-effective way to achieve product integrations. For institutions, ensuring that your educational technology tools are IMS certified is the best way to establish a plug-and-play ecosystem, allowing your tools and content to work together seamlessly, giving you more choice, and reducing your total cost of ownership.⁴ IMS Global offers travel benefits for their K-12 contributing members of which, the District is a contributing member.

Ohana Institute⁵

Ohana Institute's Global Education Student-Led Conference began 10 years ago as a way to give students a voice in how the future of education looks. Allen and Lettye (Elizabeth) Burgtorf began a K-12 personalized-based learning, holistic approach private school named Ohana Institute in 2012. As the school grew, so did the interest in state-of-the-art educational materials, how to incorporate Ohana's core values into school systems around the world, and so much more. Lettye and Allen also recognized a need for a conference that is run by the students themselves, while also sharing influential new educational ideas and opportunities. And thus, began the Global Education Conference.

ALLEGATION

It is alleged that David Atwell and Kim Culp violated School Board Policy 3.02.4.g., 3.02.5.d.ii, and 3.02.5.e.viii (Code of Ethics) by soliciting sponsorships from District approved vendor SRG Technology, LLC for the IMS Global K-12 Leadership Retreat gave rise to the appearances of impropriety.

It is alleged that Jonathan Decker violated School Board Policy 3.02.4.g. and 3.02.5.e.viii-Code of Ethics by soliciting sponsorships from District approved vendor SRG Technology, LLC for the IMS Global K-12 Leadership Retreat gave rise to the appearances of impropriety.

²Source: srgtech.com/blenderlearn

³ Source: <http://www.imsglobal.org/aboutims.html>. In 1997, IMS came into existence as a project (the Instructional Management System project) within the National Learning Infrastructure Initiative of EDUCAUSE.

⁴Source: <https://www.imsglobal.org/certifications/get-certified>

⁵Source: <https://ohanagec.org/about>

Specifically, School District Policies 3.02.4.g., 3.02.5.d.ii and 5.e.viii state the respectively:

Each employee agrees and pledges

4.g. To avoid conflicts of interest or any appearance of impropriety.

We will not solicit students, parents vendors lobbyists or others for anything that provides us a personal benefit different than the public. Unethical conduct includes, but is not limited to:

5.d.ii Accepting gifts from vendors or potential vendors for personal use or gain where there may be the appearance of a conflict of interest or appearance of impropriety.

We will not make decisions or use our position for personal benefit ot to gain an improper advantage. Unethical conduct includes, but is not limited to, the employee

viii. Soliciting or accepting, directly or indirectly, any payments or other benefits under circumstances that would create in the mind of a reasonable person in the community the belief that such payments or benefits were provided with the intent to improperly influence the employee's actions. This provision does not apply to lawful campaign contribution

COMPLAINANT INTERVIEW

On October 26, 2021, the OIG conducted an audio-recorded interview of Chief Academic Officer Dr. Glenda Sheffield at the office of Performance Accountability in West Palm Beach, FL. The following represents actual and paraphrased statements made by "Sheffield" as it relates to the Allegation:

Chief Academic Officer Dr. Glenda Sheffield has been in the position since May 2019. Dr. Sheffield has been with the School District since 1993. Dr. Sheffield reports directly to Superintendent Mike Burke.

Sheffield stated that she was made aware of a vendor-sponsored trip to Denver, Colorado for Educational Director David Atwell, IT Manager Kim Culp, and IT Technician Jonathan Decker. The Temporary Duty Elsewhere (TDE) forms sought Dr. Sheffield's approval for several days in November 2021. Dr. Sheffield explained that in an abundance of caution, she contacted the District's legal counsel, who in turn, contacted the OIG for further assistance in this matter. Dr. Sheffield stated she denied the TDE's for the individuals to Colorado as well as the TDE's for the Ohana Institute conference in Rosemary Beach, Florida also to be held in November 2021. According to Dr. Sheffield, the matter did not have the appearance of being above-board, therefore, she denied the TDE's.

WITNESS INTERVIEW

On November 17, 2021, the OIG conducted an audio-recorded interview of Assistant Superintendent Performance Accountability Dr. Adam Miller at the office of Performance Accountability in West Palm Beach, FL. The following represents actual and paraphrased statements made by “Miller” as it relates to the Allegation:

Dr. Adam Miller began his career at the School District in 2001. He currently serves as the Assistant Superintendent of Performance Accountability in the department of Performance Accountability. Previously, he was the Director of Educational Technology. Miller reports directly to Dr. Sheffield.

Miller stated before being promoted to Assistant Superintendent of Performance Accountability in May 2021, he was the Director of Educational Technology which is currently being held by David Atwell. Miller stated the IMS Global Conference is a way to get informed and stay current on the latest technology as it related to education. Miller stated that it is not unusual to receive sponsorships from IMS Global and usually, it is attended by Jonathan Decker. This year, David Atwell thought it would be a good idea to have Kim Culp attend in addition to Jonathan Decker since Culp is new to the position of Technology Manager. Miller stated that Atwell attended the IMS Global Conference when he was the Technology Manager and found the conference to be very beneficial especially since he was not that familiar with Interoperability.⁶

OIG Contact with SRG

On November 29, 2021, OIG staff contacted Chief Academic Officer Gail Pierson of SRG Technology via email with questions. On December 6, 2021, OIG staff received the following responses from Pierson via email (**Exhibit 1**):

1. District employees Jonathan Decker and Kim Culp were being sponsored by SRG?
Answer: The sponsorship was not included in our contract and it is not part of a subscription.
2. Was the sponsorship included in a contract (with the District) or was the sponsorship included as a part of a subscription?
Answer: There was not an expectation or agreement for the costs of the trip to be repaid to SRG from the District.
3. Would the cost of the trip have to be repaid to SRG from the District?
Answer: SRG sponsors activities in the District from time to time. For example, SRG is an annual sponsor of the Palm Beach Technology Conference. And SRG helps to sponsor Go Teach! scholarships for teachers, awarded each year by the Palm Beach Educational

⁶Source: A Guide to Understanding Emerging Interoperability Technologies. An interoperability technology is an integrated, automated set of capabilities that makes it easier to share resources. The shared resources are usually data, but interoperability technologies may also promote the sharing of software, physical components, or even people.

Foundation. We have provided lunch for large group training workshops, given by the SRG Blender team.

4. Has SRG previously sponsored a District employee(s)?

Answer: The SRG staff is attending and exhibiting at all conferences in 2021 in virtual mode. The IMS Global K-12 Leadership Retreat 2021 did not have a virtual component, and we did not attend.

5. Did any SRG staff also attend the IMS Global Conference, and what is the benefit of the conference to SRG?

Answer: SRG Technology sponsors a variety of Industry conferences, and Customer conferences, and activities. We are asked for particular help on occasion and we try to respond in support. Because of our long-term service in SDPBC, we try to be responsive to special requests.

6. How does SRG select who receives a sponsorship?

Answer: SRG Technology sponsors a variety of industry conferences, and customer conferences, and activities. We are asked for particular help on occasion and we try to respond in support. Because of our long-term service in SDPBC, we try to be responsive to special requests.

The work and the series of conferences produced by IMS Global are not of singular benefit to SRG Technology. IMS Global is a consortium of educators, comprised of participating K-12 Districts, Publishers, EdTech Vendors, Software Vendors, Higher Ed institutions, and so on. Members of IMS Global provide research and leadership to build an industry-wide consensus on technology and interoperability standards, across all areas of education. They are a member organization and are vendor-neutral. All participants benefit from the published standards, making it easier to integrate the multitude of platforms and software.

OIG Contact with Ohana Institute

On December 8, 2021, OIG staff received an email response from Ohana Institute employee Ashley Bell, Director of Events & Special Projects to verify the specifics of the annual Ohana Institute Student-Led Education Conference in Rosemary Beach, FL that was held on November 10-11, 2021. Bell supplied the following response via email (**Exhibit 2**):

1. How many Palm Beach County School District employees were Ohana Solutions going to sponsor for the conference that was held on November 10-11, 2021, or was it only David Atwell?

Answer: Ohana Solutions was not offering any scholarships. Ohana Institute which is a 501(c)(3) holds an annual Global Education Conference. It was offering 2 Scholarships to Palm Beach Schools staff. One was to David Atwell and the other had been offered to Dr. Adam Miller. Note: the 501 (c)(3) offered the scholarship, not Ohana Solutions.

2. Was the sponsorship included in a contract (with the District) or was the sponsorship included as a part of a subscription?

Answer: No, Ohana Institute holds no contracts or subscriptions with the Palm Beach School District.

3. Would the cost of the trip have to be repaid?

Answer: No.

4. Has Ohana previously sponsored a District employee(s), if so, what individual(s)?

Answer: Yes, the Ohana Institute holds the Global Education Conference annually. Over the years certain Palm Beach Schools staff have been Presenters, Group Leaders, and Facilitators and as such have been offered Scholarships.

5. How did Ohana Solutions select who receives a sponsorship?

Answer: Ohana Institute provides an open invitation to Educators from around the world to attend the annual conference. Each year we Scholarship selected Presenters, Group Leaders, and Facilitators who have an understanding and engagement of various educational competencies, systems, and programs that they can share with others. That is the basis for the offering of Scholarships.

OIG Contact with IMS Global

OIG staff contacted Karen Daughtery, K-12 Program Manager, IMS Global Learning Consortium, and Daughtery verified the following information via email (**Exhibit 3**):

IMS Global offers a travel benefit for our K-12 Contributing members. The travel benefit is extended to the Decision Maker⁷ for the IMS Global membership. If the Decision Maker is unable to attend the event, he/she may send a delegate.

The travel benefit for one person includes:

- Complimentary registration to the event
- Airfare to and from the event location
- Hotel room at the IMS Block rate for the duration of the event
- Meals for the duration of the event
- Reasonably incurred expenses

Please note:

- IMS prepays for the hotel room
- IMS pays for the airline ticket

For all other expenses, K-12 Contributing members must submit receipts for reimbursement within 60 days of travel.

There are two events planned for the 2022 calendar year where IMS Global will extend these travel benefits to our K-12 Contributing members.

⁷ Decision maker-The individual responsible for decisions for the department; director or supervisor.

- Learning Impact 2022 - 13 Jun 2022 to 16 Jun 2022; Nashville, TN
- K-12 Leadership Retreat - November 2022; TBD

OIG Follow-up Contact with Ohana Institute

On January 27, 2022, OIG staff contacted Ohana Institute, Inc., founder Allen Borgtorf via email. On January 31, 2022, OIG staff received a reply. In response to questions posed by OIG staff regarding how the scholarships to the event occurred and how were the District employees chosen for the scholarships, and what, if any, connection does Borgtorf have to IMS Global or SRG Technology, LLC, Borgtorf supplied the following responses (**Exhibit 4**):

First, I have no relationship with IMS Global or SRG Technology, LLC.

Second, the Ohana Institute Global Education conference (now in our 10th year) brings together educators from around the country to share ideas and best practices while interfacing with students in a live classroom setting. They also learn directly from students at Ohana Institute who detail the innovative teaching and learning systems that are in place there. Each year we offer staff scholarships to district leaders across the country to ensure they can attend as various thought leaders. Some offer presentations. Others lead discussion groups. All are there to provide information on their District's best practices and recent initiatives.

This year David Atwell, Mike (sic) Miller⁸, and Jay Boggess were offered scholarships to assist them in attending. Their positions and their knowledge would have been helpful to the other attendees. Palm Beach Schools have always been education leaders and are respected as a large district. None attended. By the way, other educators from around the country are annually offered scholarships depending on their level of expertise and theme that year of the conference.

As I have previously provided, Ohana Institute is a 501(c)3 nonprofit in Florida that has been serving students K-12 for over 11 years.

SUBJECT INTERVIEW(S)

On November 4, 2021, the OIG conducted an audio-recorded interview of Director of Technology Director David Atwell at the Office of Inspector General (OIG) in West Palm Beach, FL. The following represents actual and paraphrased statements made by "Atwell" as it relates to the Allegation:

⁸ On information and belief, the individual was Assistant Superintendent Dr. Adam Miller and not "Mike Miller."

David Atwell is the Director of Educational Technology. Atwell became the Director of Educational Technology in July 2021. Prior to that, he was in the Choice & Career Options Department with the School District. Atwell reports directly to Dr. Adam Miller.

Atwell stated that he is aware of School District Policy 3.02-Code of Ethics. Atwell stated the department has participated in the IMS Global Learning Consortium (IMS)⁹ conference for the past three years. Atwell stated that he has attended the event twice since coming to the department. Per Atwell, IMS brings vendors and users from different school districts across the nation together, and IMS helps to create standards for using educational and learning technology such as Blender. Atwell went on to state that at the conference he would have been able to get a clearer understanding of interoperability. Atwell stated he would send members from the Digital Curriculum team in the department to attend the conference.

According to Atwell, Jonathan Decker consistently works on the education technology standards, so, he needs to remain up to date on the latest standards. Decker, along with Kim Culp were to go on the trip to Colorado. Kim Culp is the new manager and needed the training for his new position. Per Atwell, due to Decker's job responsibilities, he is usually the main person that attends the IMS Global Conference.

According to Atwell, generally, a portion of the trip to the conference is included in the cost of the IMS subscription. However, SRG sponsored two additional team members for the conference. Also, as a part of the subscription, the department received newsletters to keep them up-to-date on the latest technology standards.

As far as his influence, Atwell stated in certain aspects, he does have influence regarding what technology gets utilized because if the technology is no longer working for the District, then the District must seek another vendor to provide the services. Atwell stated no one from either IMS or SRG (Blender) has tried to influence him in any way (no trips, money, gift cards, or other items) to utilize their technology/products. Atwell also stated that it was not his idea to ask SRG for a scholarship to the IMS Global conference and is not sure if anyone told Decker to contact them either.

Additionally, Atwell clarified that the Ohana conference in November 2021, was meant for two individuals from the District; Boggess and Miller. According to Atwell, Boggess did not wish to attend for reasons unknown to him. Per Atwell, Decker was not a part of the Ohana trip. Per Atwell, whoever can attend, goes, but it's not specific to any one in the District. The trip is usually covered by Ohana with no repayment from the District required.

On November 4, 2021, the OIG conducted an audio-recorded interview of Manager of Instructional Technology Kim Culp at the Office of Inspector General (OIG) in West Palm Beach, FL. The following represents actual and paraphrased statements made by "Culp" as it relates to the Allegation:

⁹ Source: <https://www.imsglobal.org/aboutims.html>. IMS has published a broad range of learning technology interoperability standards available under a royalty-free license.

Kim Culp is the Educational Technology Manager. Culp began in the Educational Technology Department in 2007 as a Technology Program Specialist. In August 2021, he was promoted to Instructional Technology Manager. Culp reports directly to Atwell.

Culp stated he was promoted in August 2021 to the position of Manager of Instructional Technology. Culp stated he provides advice on what technology comes to the District but does not have direct influence over it and the final approval rests with David Atwell. Culp stated Atwell came to him about one month ago telling him that he (Atwell) attended the IMS Global K-12 Leadership Retreat when he became manager and felt that it was an excellent conference as far as training and getting the latest information on technology standards. Culp stated Atwell knew that he did not have a lot of experience with digital data and recommended that he attend the conference along with team leader Jonathan Decker. Culp wanted to learn about interoperable data.

Culp stated the Educational Technology department does not have any funding for training and the budget has been severely cut. Culp stated he is aware of the School District Code of Ethics (Policy 3.02). Culp stated he has not had any contact with representatives from IMS Global or SRG (Blender), including telephone or via email, and he does not have any influence over technology software/program decisions.

On January 10, 2022, the OIG conducted an audio-recorded interview of Technology Program Specialist Jonathan Decker at the Office of Inspector General (OIG) in West Palm Beach, FL. The following represents actual and paraphrased statements made by “Decker” as it relates to the Allegation:

Jonathan Decker began his career with School District in 2000 as a biology teacher. In 2007, he transferred to the Educational Technology Department in the capacity of Technology Program Specialist. Decker reports directly to Atwell.

Per Decker, IMS Global is part of a consortium that sets the technical standards for the way IT can export student data including textbook data to ensure interoperability. IMS Global has meetings throughout the year to bring individuals together to review and update the standards. Decker stated the conferences are for IT professionals around the globe to come together and get the latest information on standards for programs like Blender. Decker stated he does have knowledge of School District Policy 3.02-Code of Ethics and has taken the District required annual training.

Decker stated that he cannot be certain of how the sponsorship from SRG Technology (Blender) for the IMS Global retreat came about, but thinks he mentioned it to “Karen” of SRG Technology since he is the one that is on weekly technology calls with SRG and has built a rapport with SRG. Decker explained to “Karen” that his department does not have a budget and if SRG would be able to sponsor District employees for the IMS Global K-12 Leadership Retreat. The three individuals (Atwell, Culp, and himself) thought it would be a good idea to send additional people without impacting District funding. Decker stated he thought he was doing the right thing and had no intentions of doing anything wrong.

Regarding the Ohana Institute's Global Education Conference in Rosemary Beach, FL., Decker stated he previously attended, but did not handle the travel arrangements, and does not know how it was funded. Decker denied having any personal relationships with anyone at IMG Global Learning Consortium, SRG Technology (Blender), or anyone at the Ohana Institute. Decker stated his relationships are collegiate only. Decker also stated he has not received any gifts; money or trips from anyone at SRG Technology. According to Decker, as far as he knows, IMS gives travel options; you can either pay for the trip up front and IMS reimburses you, or you can let their travel agents book the trip. Decker stated he doesn't recall how the trips were covered this time around. Decker stated no one at SRG has ever tried to influence his opinion about Blender nor has he received any gifts or anything of value from them.

RECORDS REVIEWED

Exhibit 1: Email from Gail Pierson, RE: Sponsorship

Exhibit 2: Email from Ashley Bell, Ohana Institute

Exhibit 3: Email from Karen Daughtery, IMS Global Learning Consortium

Exhibit 4: Email from Allen Burgtorf, Founder, Ohana Institute

Exhibit 5: Email documentation between subjects, and vendors.

Exhibit 6: SRG Technology, LLC sponsorship approval letter

Exhibit 7: SRG Technology Contract Renewal Presentation

CONCLUSION

Email documentation illustrated that Atwell, Decker, and Culp appeared to have been transparent in their contact with District-approved vendor SRG Technology as well as non-District-approved vendor/colleague Ohana Institute **See Table 1 (Exhibit 5)**. As a contributing member of the IMS Global Learning Consortium, complimentary travel benefits are included. This benefit was extended to the decision-maker in the department, but can be extended to a delegate if the decision-maker could not attend. Atwell would have been considered the decision-maker as he is the director of the Educational Technology Department. For Culp and Decker, District-approved vendor SRG Technology, LLC (Blender) agreed to sponsor them for the IMS Global Conference after contact was initiated by Decker. The travel costs were not to exceed \$2,000.00, in total (flight, lodging, registration, and incidentals included). Email documentation supports these events **(Exhibit 6)**. However, the amount of the sponsorship includes two individuals instead of the individual that would have automatically been included in IMS Global's subscription benefits. In a subsequent follow-up interview with Atwell and Decker, it was disclosed by both individuals that Atwell was not included in the IMS Global conference; it was only for Decker and Culp. OIG staff verified with Dr. Sheffield's Executive Administrative Assistant Diane Wood that she does not have a TDE request for Atwell for the IMS Global conference; only for the Ohana conference. OIG staff also noted that Atwell was to attend the Ohana conference in the place of Miller who was unable to attend.

During Atwell's interview, he acknowledged that he does have influence in terms of deciding whether or not a program is beneficial to the District, but maintained that he has not had to utilize that authority. Atwell also makes decisions that are in the best interest of the students and teachers in terms of educational (technology) programs. Therefore, it would have been acceptable for Atwell or Decker (not both) to attend the IMS conference as it is included in the travel benefit for IMS Global. Although transparency was present as detailed in the email records, it also appeared that Decker was the main and only individual that approached SRG Technology for the sponsorship after which, SRG agreed. In a follow-up interview, Atwell reiterated that he did not approach SRG Technology for sponsorship and did not direct Decker to do so.

Regarding the Ohana Institute conference, Allen Burgtorf stated in his email that Ohana offers scholarships to district leaders across the country. As such, scholarships were extended to Miller and Boggess; Miller was not able to attend, therefore, Atwell attempted to attend in Miller's place. Ohana offered a third to a school principal. From email documentation, it did not appear that any of the District employees approached Burgtorf for scholarships, it was offered to them. OIG staff also verified that per the Purchasing website, neither Ohana Solutions, Ohana Institute, nor Ohana is listed as a District-approved vendor. However, according to the District's Monthly Purchasing and Disbursement Report for October 2018, Ohana Solutions received \$1,680.00 (consultant fee) for e-campus training in Rosemary Beach, FL. No other business relationships appear between the District and Ohana Solutions/Institute.

The District supports and encourages collaboration between District employees and vendors that are for the benefit of the students. However, sound judgment should be exercised. Therefore, it is worth noting that SRG Technology (Blender) renewed its contract with the District in July 2021; the third year of a three-year agreement (**Exhibit 7**). Whether it be termed scholarship or sponsorship, District employees must be cognizant of possible appearances of impropriety when the District has an ongoing relationship with an organization (SRG) or the potential (possibility) to develop one in the future (as in the case of Ohana). Additionally, sponsorships from vendors whether District approved or not, have the potential of the appearance of impropriety and be considered a gift and therefore, in violation of School District Policies 3.02.4.g., 3.02.5.d.ii, and 5.e.viii of the Code of Ethics.

OIG staff contacted SRG Technology Chief Academic Officer Gail Pierson to determine if she felt pressured to sponsor Decker and Culp. Pierson stated she did not feel any pressure and did not feel that if she did not commit to a sponsorship that SRG's contract with the District would be in jeopardy. Pierson stated that SRG has a long and good relationship with the District and welcomed the opportunity to improve Blender. Based on documentation reviewed and the evidence presented the OIG determined, the allegation that David Atwell and Kim Culp violated School Board Policy 3.02.4.g., 3.02.5.d.ii, and 3.02.5.e.viii by soliciting sponsorships from District approved vendor SRG Technology, LLC to attend the IMS Global K-12 Leadership Retreat was **Unsubstantiated**.

The allegation that Jonathan Decker violated the Code of Ethics, specifically, School Board Policies 3.02.4.g., 3.02.5.d.ii, and 3.02.5.e.viii by soliciting sponsorships from District approved vendor SRG Technology, LLC to attend the IMS Global K-12 Leadership Retreat thereby giving rise to the appearances of impropriety was **Substantiated**.

Table: 1: Email Exchanges (Exhibit 5)

AUGUST 31, 2021

- EMAIL INVITE TO DAVID ATWELL FROM THE OHANA INSTITUTE’S GLOBAL EDUCATION CONFERENCE TO BE HELD IN NOVEMBER 2021.

SEPTEMBER 14, 2021

- EMAIL FROM DAVID ATWELL TO TECHNOLOGY PROGRAM SPECIALIST DANA RUBENSTEIN, ADVISING THAT HE WILL BE WORKING WITH CHIEF OF STAFF JAY BOGGESS TO SEE IF HE HAS SOMEONE THAT HE THINKS WOULD BE GOOD TO GO TO THE OHANA CONFERENCE.’”

SEPTEMBER 21, 2021

- EMAIL FROM OHANA FOUNDER ALLEN BURGTORF TO ATWELL ADVISING THAT HE (BURGTORF) SPOKE TO “ADAM” (ADAM MILLER) WHO, IN TURN, CHECKED IN WITH JAY BOGGESS, AND AS A RESULT, BURGTORF OFFERED BOGGESS ONE OF TWO SCHOLARSHIP OPPORTUNITIES. FROM THERE, TWO ADDITIONAL SCHOLARSHIPS WERE OFFERED FOR THE OHANA CONFERENCE IN ROSEMARY BEACH, FL.
- ATWELL EMAILED DANA RUBENSTEIN TO ADVISE HER THAT HE AND JAY BOGGESS WILL ATTEND THE OHANA CONFERENCE.

SEPTEMBER 22, 2021

- EMAIL RECORDS APPEAR TO INDICATE THAT JONATHAN DECKER WAS THE ONLY INDIVIDUAL THAT INITIATED CONTACT WITH SRG CHIEF ACADEMIC OFFICER GAIL PIERSON. THE EMAIL APPEARED TO BE A FOLLOW-UP EMAIL OUTLINING THE SPECIFIC DETAILS NEEDED FOR APPROVAL FROM THE DISTRICT TO GO TO THE IMS GLOBAL CONFERENCE.

SEPTEMBER 23, 2021

- EMAIL FROM SRG CHIEF ACADEMIC OFFICER GAIL PIERSON TO ATWELL, CULP, AND DECKER ADVISING THAT SRG AGREED TO SCHOLARSHIP THE DISTRICT EMPLOYEES FOR THE IMS GLOBAL CONFERENCE IN DENVER, CO. THE SPONSORSHIP INCLUDED FLIGHT, LODGING, REGISTRATION, AND INCIDENTALS. TRAVEL COSTS WERE NOT TO EXCEED \$2,000.00. PER PIERSON, IT WOULD BE SRG’S FIRST TIME ATTENDING THE IMS GLOBAL CONFERENCE.
- JONATHAN DECKER SENDS AN EMAIL TO EDUCATIONAL TECHNOLOGY DEPARTMENT SENIOR BUDGET TECHNICIAN CORETTA WILLIAMS ADVISING HER THAT SRG TECHNOLOGY IS WILLING TO SPONSOR THE IMS GLOBAL RETREAT CONFERENCE IN NOVEMBER, AND HOW CAN IT BE COMPLETED?
- SENIOR BUDGET TECHNICIAN CORETTA WILLIAMS SOUGHT GUIDANCE ON HOW TO PROCESS SCHOLARSHIPS FROM ACCOUNTS PAYABLE AND ACCOUNTING SERVICES.

SEPTEMBER 23, 2021-SEPTEMBER 24, 2021

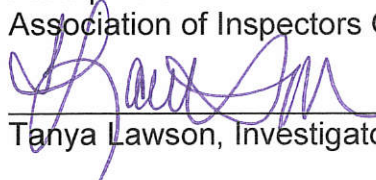
- A LETTER DATED SEPTEMBER 24, 2021, FROM PIERSON ACKNOWLEDGING THE SPONSORSHIP FOR KIM CULP AND JONATHAN DECKER TO THE IMS GLOBAL LEADERSHIP RETREAT IN NOVEMBER 2021.

- SEPTEMBER 24, 2021-DISTRICT COMPLIANCE AND SPECIAL PROJECTS MANAGER GREG OSTAFFE RESPONDED TO WILLIAMS AND SUGGESTED THAT THE BEST WAY TO DO THE SPONSORSHIPS WOULD BE TO GET A CHECK FROM THE VENDOR IN THE AGREED-UPON AMOUNT.
- WILLIAMS EMAILED PIERSON ADVISING HER THAT A CHECK SHOULD BE MAILED TO THE SCHOOL DISTRICT OF PALM BEACH COUNTY PAYABLE TO THE SCHOOL DISTRICT.

The evidentiary standard used by the School District of Palm Beach County OIG in determining whether the facts and claims asserted in the complaint were proven or disproven is based upon the preponderance of the evidence. Preponderance of the evidence is contrasted with “beyond a reasonable doubt,” which is the more severe test required to convict a criminal, and “clear and convincing evidence,” a standard describing proof of a matter established to be substantially more likely than not to be true. OIG investigative findings classified as “substantiated” means there was sufficient evidence to justify a reasonable conclusion that the actions occurred and there was a violation of law, policy, rule, or contract to support the allegation. Investigative findings classified as “unfounded” means sufficient evidence to justify a reasonable conclusion that the actions did not occur and there was no violation of law, policy, rule, or contract to substantiate the allegation. Investigative findings classified as “unsubstantiated” means there was insufficient evidence to justify a reasonable conclusion that the actions did or did not occur and a violation of law, policy, rule, or contract to support the allegation could not be proven or disproven.

ATTESTATION

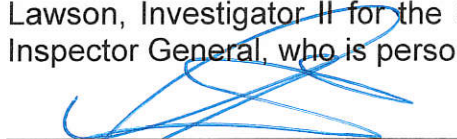
I, the undersigned, do hereby swear, under penalty of perjury, to the best of my personal knowledge, information, and belief, the contents of this report are true and accurate; and I have not knowingly or willfully deprived or allowed another to deprive, the subject of the investigation of any rights contained in Sections 112.532 and 112.533, Florida Statutes. This investigation was conducted pursuant to School District Policy 1.092, Inspector General, and in accordance with applicable Principles and Standards for Offices of Inspectors General as published by the Association of Inspectors General.



Tanya Lawson, Investigator II

**STATE OF FLORIDA
COUNTY OF PALM BEACH**

Sworn to (or affirmed) and subscribed before me this 07 day of July 2022, by Tanya Lawson, Investigator II for the School District of Palm Beach County, Office of Inspector General, who is personally known by me.



Signature of Notary Public
 Notary Public or Law Enforcement Officer



This investigation was conducted by Tanya Lawson, supervised and approved by Director of Investigations Oscar Restrepo. The investigation was conducted in accordance with guidance from the Association of Inspectors General handbook and within standards as prescribed by the Commission for Florida Law Enforcement Accreditation.

Supervised by:  Date: 7/5/2022
Oscar Restrepo, Director of Investigations

Approved by:  Date: 7/5/22
Teresa Michael, Inspector General

EXHIBIT LIST

December 6, 2021, Email from Gail Pierson, SRG Technology **Exhibit 1**
December 15, 2021, Email from Ashley Bell, Ohana Institute..... **Exhibit 2**
January 10, 2022, Email from Karen Daughtery, IMS Global..... **Exhibit 3**
January 27, 2022, Email from Ohana Institute Founder Allen Burgtorf **Exhibit 4**
January 19, 2022, Email Records **Exhibit 5**
January 19, 2022, Grant Letter from Gail Pierson..... **Exhibit 6**
March 1, 2022, SRG Technology Contract Renewal Presentation..... **Exhibit 7**

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TANYA Lawson <tanya.lawson@palmbeachschools.org>

Sponsorship-IMS Global Retreat (Nov 2021)

Activity #: 22-0004-I
DIG Staff: LAWSON
Date Rec'd: 12/6/21 Pages: _____
Rec'd: LAWSON Mon, Dec 6, 2021 at 3:09 PM
Redacted: Yes No N/A Req'd TBD
Exhibit/Reference #: 1

Gail Pierson <gail.pierson@srgtech.com>
To: tanya.lawson@palmbeachschools.org
Cc: Gail Pierson <gail.pierson@srgtech.com>

Dear Ms. Lawson,

We value our longstanding relationship with the School District of Palm Beach County.

I am happy to provide information for the questions you sent to me, in the order they are listed below.

1. SRG Technology was to sponsor the travel for Jonathan Decker and Kim Culp.
2. The sponsorship was not included in our contract and it is not part of a subscription.
3. There was not an expectation or agreement for the costs of the trip to be repaid to SRG from the District.
4. SRG sponsors activities in the District from time to time. For example, SRG is an annual sponsor of the Palm Beach Technology Conference. And SRG helps to sponsor Go Teach! scholarships for teachers, awarded each year by the Palm Beach Educational Foundation. We have provided lunch for large group training workshops, given by the SRG Blender team.
5. The SRG staff is attending and exhibiting at all conferences in 2021 in virtual mode. The IMS Global K-12 Leadership Retreat 2021 did not have a virtual component, and we did not attend.

The work and the series of conferences produced by IMS Global are not of singular benefit to SRG Technology. IMS Global is a consortium of educators, comprised of participating K-12 Districts, Publishers, Edtech Vendors, Software Vendors, Higher Ed institutions, and so on. Members of IMS Global provide research and leadership to build an industry-wide consensus on technology and interoperability standards, across all areas of education. They are a member organization, and are vendor-neutral. All participants benefit from the published standards, making it easier to integrate the multitude of platforms and software.

6. SRG Technology sponsors a variety of Industry conferences, and Customer conferences and activities. We are asked for particular help on occasion and we try to respond in support. Because of our long-term service in SDPBC, we try to be responsive to special requests.

Please let me know if I can answer any additional questions or provide additional information.

Best regards,
Gail Pierson

Gail Elizabeth Pierson
Chief Academic Officer
SRG Technology LLC
PH 617-283-0651

----- Forwarded message -----

[Quoted text hidden]

Disclaimer: Under Florida law, e-mail addresses are public records. If you do not want your e-mail address released in response to a public records request, do not send electronic mail to this entity. Instead, contact this office by phone or in writing.

1/2



TANYA Lawson <tanya.lawson@palmbeachschools.org>

Sponsorship-IMS Global Retreat (Nov 2021)

Gail Pierson <gail.pierson@srgtech.com>

Mon, Jan 3, 2022 at 11:36 AM

To: TANYA Lawson <tanya.lawson@palmbeachschools.org>

Cc: Gail Pierson <gail.pierson@srgtech.com>

Hello Tanya,

Happy New Year.

To answer your additional questions:

IMS Global is a non-profit consortium-style organization. Participants join, pay dues and become members. There are several "flavors" and tiers of membership. Memberships for companies/vendors are structured differently than memberships for government/educational/non-profit organizations. Benefits vary as well. The membership in IMS Global has been growing consistently.

For all levels, there are some events, webinars, etc. that are included in the membership fee, and others that are for an additional charge.

There is a large and growing library of technical materials available to all members, for no additional cost.

The above points do not represent a change to any of my previous points.

Let me know if you need anything else.

Thank you,
Gail

Gail Elizabeth Pierson
Chief Academic Officer
SRG Technology LLC
PH 617-283-0651

[Quoted text hidden]



TANYA Lawson <tanya.lawson@palmbeachschools.org>

Sponsorship-Ohana Institute's Global Education Conference

Ashley Bell <abell@ohanainstitute.org>
To: TANYA Lawson <tanya.lawson@palmbeachschools.org>

Wed, Dec 15, 2021 at 1:08 PM

Hi Tanya,

I am happy to answer your questions. Please see below my answers in black and feel free to reach out if I can help in any other way.

Thanks!
Ashley Bell

Activity #: 22-0004-1
 OIG Staff: Lawson
 Date Rec'd: 12/15/21 Pages: 2
 Rec'd: Lawson
 Redacted: No N/A Req'd TBD
 Exhibit/Reference #: 2

On Dec 8, 2021, at 2:44 PM, TANYA Lawson <tanya.lawson@palmbeachschools.org> wrote:

As a part of the School District's efforts to maintain transparency, the Office of Inspector General has to occasionally document and verify the terms and conditions of sponsorships as per the School District Policy 1.092-Inspector General.

Please verify the following information:

1. How many Palm Beach County School District employees were Ohana Solutions going to sponsor for the conference that was held on November 10-11, 2021 or was it only David Atwell? Ohana Solutions was not offering any scholarships. Ohana Institute which is a 501C(3) holds an annual Global Education Conference. It was offering 2 Scholarships to Palm Beach Schools staff. One was to David Atwell and the other had been offered to Dr. Adam Miller.
2. Was the sponsorship included in a contract (with the District) or was the sponsorship included as a part of a subscription? No, Ohana Institute holds no contracts or subscriptions with the Palm Beach School District.
3. Would the cost of the trip have to be repaid? No.
4. Has Ohana previously sponsored a District employee(s), if so, what individual(s)? Yes, the Ohana Institute holds the Global Education Conference annually. Over the years certain Palm Beach Schools staff have been Presenters, Group Leaders and Facilitators and as such have been offered Scholarships.
5. How did Ohana Solutions select who receives a sponsorship? Ohana Institute provides an open invitation to Educators from around the world to attend the annual conference. Each year we Scholarship selected Presenters, Group Leaders and Facilitators who have understanding and engagement of various educational competencies, systems and programs that they can share with others. That is the basis for the offering of Scholarships.

If you are not the proper individual to answer these questions, please feel free to forward this email to the correct individual.

Thank you,
Tanya M. Lawson, Investigator, CIGI, CFE
Office of Inspector General
Phone: 561-434-8511

1/2



TANYA Lawson <tanya.lawson@palmbeachschools.org>

Sponsorship-Ohana Institute's Global Education Conference

Ashley Bell <abell@ohanainstitute.org>

Mon, Feb 7, 2022 at 1:04 PM

To: TANYA Lawson <tanya.lawson@palmbeachschools.org>

Hi Tanya,

The clarification there is that Ohana SOLUTIONS, the education consulting company, was not offering any scholarships. Ohana INSTITUTE, the non profit 501c3 K-12 school, was offering two. They are two completely separate companies and entities.

Thanks!

[Quoted text hidden]

2/2



TANYA Lawson <tanya.lawson@palmbeachschools.org>

Activity #: 22-0004-T
OIG Staff: Lawson
Date Rec'd: 1/10/22 Pages: 1
Rec'd: Lawson
Is Urgent: Yes No N/A Req'd TBD
Exhibit/Reference #: 3

K-12 Travel Benefits for IMS Global

Karen Daughtery <kdaughtery@imglobal.org>

To: TANYA Lawson <tanya.lawson@palmbeachschools.org>

Mon, Jan 10, 2022 at 3:41 PM

To Whom It May Concern,

IMS Global offers a travel benefit for our K-12 Contributing members. The travel benefit is extended to the Decision Maker for the IMS Global membership. If the Decision Maker is unable to attend the event, he/she may send a delegate.

The travel benefit for one person includes:

- Complimentary registration to the event
- Airfare to and from the event location
- Hotel room at the IMS Block rate for the duration of the event
- Meals for the duration of the event
- Reasonably incurred expenses

Please note:

- IMS prepays for the hotel room
- IMS pays for the airline ticket

For all other expenses, K-12 Contributing members must submit receipts for reimbursement within 60 days of travel.

There are two events planned for the 2022 calendar year where IMS Global will extend these travel benefits to our K-12 Contributing members.

- Learning Impact 2022 - 13 Jun 2022 to 16 Jun 2022; Nashville, TN
- K-12 Leadership Retreat - November 2022; TBD

Please let me know if you have any questions.

Karen Daughtery

K-12 Program Manager
IMS Global Learning Consortium
kdaughtery@imglobal.org
Schedule a Meeting on my Calendar
Mobile: 770-680-6631

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OIG staff contacted Karen Daughtery, K-12 Program Manager, IMS Global Learning Consortium, and Daughtery verified the following information via email **(Exhibit 3)**:

IMS Global offers a travel benefit for our K-12 Contributing members. The travel benefit is extended to the Decision Maker⁷ for the IMS Global membership. If the Decision Maker is unable to attend the event, he/she may send a delegate.

The travel benefit for one person includes:

- Complimentary registration to the event
- Airfare to and from the event location
- Hotel room at the IMS Block rate for the duration of the event
- Meals for the duration of the event
- Reasonably incurred expenses

Please note:

- IMS prepays for the hotel room
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- Learning Impact 2022 - 13 Jun 2022 to 16 Jun 2022; Nashville, TN
- K-12 Leadership Retreat - November 2022; TBD

On January 27, 2022, OIG staff contacted Ohana Institute, Inc., founder Allen Borgtorf via email. On January 31, 2022, OIG staff received a reply. In response to questions posed by OIG staff regarding how the scholarships to the event occurred and how were the District employees chosen for the scholarships, and what, if any, connection does Borgtorf have to IMS Global or SRG Technology, LLC, Borgtorf supplied the following responses **(Exhibit 4)**

First, I have no relationship with IMS Global or SRG Technology, LLC.

Second, the Ohana Institute Global Education conference (now in our 10th year) brings together educators from around the country to share ideas and best practices while interfacing with students in a live classroom setting. They also learn directly from students at Ohana Institute who detail the innovative teaching and learning systems that are in place there. Each

⁷ Decision maker-The individual responsible for decisions for the department; director or supervisor.



TANYA Lawson <tanya.lawson@palmbeachschools.org>

Conference Sponsorship 2021

Activity #: 22-0004-I
 OIG Staff: LAWSON
 Date Rec'd: 1/27/22 Pages: 1
 Rec'd: LAWSON Thu, Jan 27, 2022 at 2:15 PM
 Redacted: Yes No N/A Req'd TBD
 Exhibit/Reference #: 4

Allen Burgtorf <aburgtorf@gmail.com>
 To: TANYA Lawson <tanya.lawson@palmbeachschools.org>

Tanya, thanks for your email. Happy to provide the following answers to your questions.

First, I have no relationship with IMS Global or SRG Technology, LLC.

Second, the Ohana Institute Global Education conference (now in our 10th year) brings together educators from around the country to share ideas and best practices while interfacing with students in a live classroom setting. They also learn directly from students at Ohana Institute who detail the innovative teaching and learning systems that are in place there. Each year we offer staff scholarships to district leaders across the country to ensure they can attend as various thought leaders. Some offer presentations. Others lead discussion groups. All are there to provide information on their District's best practices and recent initiatives.

This year David Atwell, Mike Miller, and Jay Boggess were offered scholarships to assist them in attending. Their positions and their knowledge would have been helpful to the other attendees. Palm Beach Schools have always been education leaders and are respected as a large district. None attended. By the way, other educators from around the country are annually offered scholarships depending on their level of expertise and theme that year of the conference.

As I have previously provided, Ohana Institute is a 501(c)3 nonprofit in Florida that has been serving students K-12 for over 11 years.

Many thanks,

Allen

Allen Burgtorf

[Quoted text hidden]

[Quoted text hidden]

Disclaimer: Under Florida law, e-mail addresses are public records. If you do not want your e-mail address released in response to a public records request, do not send electronic mail to this entity. Instead, contact this office by phone or in writing.

Activity #: 22-0004 F
OIG Staff: LAWSON
Date Rec'd: 1/19/22 Pages: 19
Rec'd: LAWSON
Redacted: Yes No N/A Req'd TBD
Exhibit/Reference #: 5

From: on behalf of Dana Rubenstein
Sent: Tuesday, August 31, 2021 3:33 PM
To: david.atwell@palmbeachschools.org
Cc: john.shoemaker@palmbeachschools.org; kim.culp@palmbeachschools.org
Subject: Ohana Institute's Global Education Conference

Dave,



Once you decide on the principal leader to offer the Ohana Institute's Global Education Conference sponsorship to, please share the detailed information below with the candidate. Once the person accepts the invitation, we will request a headshot to promote this wonderful opportunity at our tech conference. If the candidate cannot attend the Ohana Institute Global Education Conference on November 10-11, 2021, Allen Burgtorf mentioned he/she may attend next year's conference.

We are excited to invite you to join us in Rosemary Beach, Florida on November 10-11, 2021 for the annual Ohana Institute Student-Led Education Conference. Each year, this conference brings together thought leaders and senior-level district administrators from some of the largest school districts in the U.S. As we celebrate our 10th year, we are proud to welcome visionaries interested in exploring the Ohana model and hearing about the latest trends in education. The all-inclusive package being offered will include:

- Roundtrip Airfare
- 2-night stay at The Pearl Hotel, Rosemary Beach
- Transportation to & from the airport
- Conference Registration Fee
- Welcome Reception (evening of 11/10)
- Conference-Sponsored Meals
- VIP Dinner at Havana Beach (11/11)

Please feel free to reach out to me anytime at ABell@ohanasolutions.org or 561-676-6437.

Thank you!

Ashley Bell
Director of Events & Special Projects
561.676.6437
www.ohanasolutions.org

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Please visit EdTechTraining.palmbeachschools.org to view recorded livestream webinars and additional resources. Also, [click here](#) to subscribe to our Ed Tech Training Calendar and all of our events will show up right on your Google Calendar.

Dana Rubenstein, M.Ed.
Technology Program Specialist
Educational Technology Department
The School District of Palm Beach County
3300 Forest Hill Blvd. Suite B-332

From: on behalf of David C. Atwell
Sent: Tuesday, September 14, 2021 9:24 AM
To: dana.rubenstein@palmbeachschools.org
Subject: Re: Ohana Institute's Global Education Conference

I'm working with Jay Boggess to see if he has someone that he thinks would be good to go.

On Tue, Aug 31, 2021 at 3:33 PM Dana Rubenstein <dana.rubenstein@palmbeachschools.org> wrote:
Dave,

Once you decide on the principal leader to offer the Ohana Institute's Global Education Conference sponsorship to, please share the detailed information below with the candidate. Once the person accepts the invitation, we will request a headshot to promote this wonderful opportunity at our tech conference. If the candidate cannot attend the Ohana Institute Global Education Conference on November 10-11, 2021, Allen Burgtorf mentioned he/she may attend next year's conference.

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Dana Rubenstein, M.Ed.
Technology Program Specialist
Educational Technology Department

From: on behalf of David C. Atwell
Sent: Tuesday, September 21, 2021 4:10 PM
To: dana.rubenstein@palmbeachschools.org
Subject: Re: Ohana Institute's Global Education Conference

Keeping you up to date:

Jay will be going. I will be going too. Not sure about the nomination. Will work something out.

Dave

On Tue, Sep 14, 2021 at 9:24 AM David C. Atwell <david.atwell@palmbeachschools.org> wrote:

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Ashley Bell
Director of Events & Special Projects
561.676.6437
www.ohanasolutions.org

From: on behalf of David C. Atwell
Sent: Tuesday, September 21, 2021 4:32 PM
To: aburgtorf@gmail.com
Cc: abell@ohanasolutions.org
Subject: Re: Participant Deadline
Attachments: IMG_2695.jpeg; IMG_2692.jpeg; IMG_2693.jpeg; IMG_2694.jpeg

Very cool! I'm sure that would be impactful work. Growing up in the 3rd world, but definitely on the better side of it, has instilled a profound appreciation for what the United States affords its citizens. It is good for all students to experience it in some way even if only for a trip.

I was just talking with Ruthy, Jay's admin assistant, and it looks like Jay will be attending. Adam is not going to be able to make it, so I will be attending in his stead. That only leaves the 3rd scholarship which I'll get to you as soon as I can.

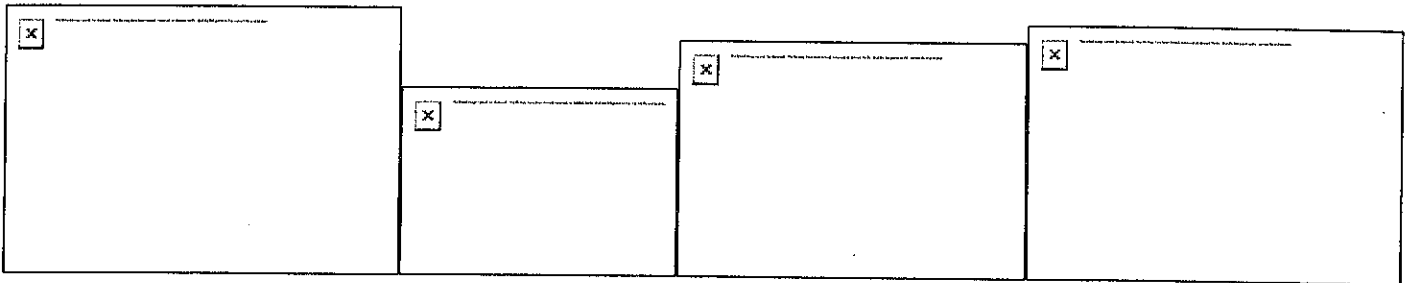
Thanks,

Dave

On Tue, Sep 21, 2021 at 11:42 AM Allen Burgtorf <aburgtorf@gmail.com> wrote:

Hi David! Thanks for reaching out. I'm not sure if Ashley connected with you on this already so apologies. I did speak to Adam on Friday and he was checking back in with Jay Boggess as we had offered him one of the two scholarship opportunities. So at this point, we are prepared to offer two scholarships (beyond the 3rd your offering to a Principal).

I am in Nicaragua right now with some of the Ohana Institute staff. We are considering a collaboration here. Your heart goes out to these children here as education is certainly not the priority. Most teachers barely have a high school degree themselves and yet the families are "hoping" that their children can in fact get a leg up and have a better life. I suspect Ohana Institute will forge a partnership here but will see. We have a big meeting later this morning to determine just that.



In the meantime, let us know what we can do to help and assist with the attendance for the conference.

Many thanks,

Allen

From: on behalf of Dana Rubenstein
Sent: Wednesday, September 22, 2021 10:43 AM
To: david.atwell@palmbeachschools.org
Subject: Re: Ohana Institute's Global Education Conference

Excellent. Please send the information below to Jay so he may coordinate with Ashley. Thank you.

We are excited to invite you to join us in Rosemary Beach, Florida on November 10-11, 2021 for the annual Ohana Institute Student-Led Education Conference. Each year, this conference brings together thought leaders and senior-level district administrators from some of the largest school districts in the U.S. As we celebrate our 10th year, we are proud to welcome visionaries interested in exploring the Ohana model and hearing about the latest trends in education. The all-inclusive package being offered will include:

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Ashley Bell
Director of Events & Special Projects
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www.ohanasolutions.org

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the invitation, we will request a headshot to promote this wonderful opportunity at our tech conference. If the candidate cannot attend the Ohana Institute Global Education Conference on November 10-11, 2021, Allen Burgdorf mentioned he/she may attend next year's conference.

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- Conference-Sponsored Meals
- VIP Dinner at Havana Beach (11/11)

Please feel free to reach out to me anytime at ABell@ohanasolutions.org or 561-676-6437.

Thank you!

Ashley Bell
Director of Events & Special Projects
561.676.6437
www.ohanasolutions.org

Please visit EdTechTraining.palmbeachschools.org to view recorded livestream webinars and additional resources. Also, [click here](#) to subscribe to our Ed Tech Training Calendar and all of our events will show up right on your Google Calendar.

Dana Rubenstein, M.Ed.
Technology Program Specialist
Educational Technology Department
The School District of Palm Beach County
3300 Forest Hill Blvd. Suite B-332
West Palm Beach, FL 33406
Phone (561) 434-8128
dana.rubenstein@palmbeachschools.org
https://www.palmbeachschools.org/departments/educational_technology





David C. Atwell <david.atwell@palmbeachschools.org>

IMS Global Retreat Sponsor/Partnership

i messages

Jonathan Decker <jonathan.decker@palmbeachschools.org>

To: Gail Pierson <gail.pierson@srgtech.com>

Wed, Sep 22, 2021 at 1:23 PM

Cc: "David C. Atwell" <david.atwell@palmbeachschools.org>, Kim Culp <kim.culp@palmbeachschools.org>

Hi Gail

As we discussed IMS is holding their annual K12 Leadership retreat in November, and SRG is considering graciously sponsoring Palm's participation this year and we are exceedingly grateful for this consideration.

K-12 Leadership Retreat 2021

K-12 Contributing Member Meeting



Please review our COVID-19 safety information. We will continue to update as we get closer the meeting.

Hotel & Travel

Participants must reserve rooms at the Magnolia Hotel by Monday, 18 October, and must be to receive the discounted rate of \$139 USD plus taxes, per night.

David has decided this conference would be a great introduction for Kim Culp to IMS Global and as always, I will be working to see how other districts are representing and how our work in Blender can continue to align with their supported standards.

We would like to submit our internal paperwork absolutely asap to get approval for our participation and to hopefully keep costs to a minimum. In order to submit the paperwork, we would require a statement from you indicating SRG's intention to cover the travel lodging and registration fee required.

For planning purposes, we intend to keep all costs as minimal possible and I think we would be realistically facing the following

Flights (considering two possible departure airports airport and and carry-on costs ets) we estimate somewhere between 300-500 total - and possibly less
 Lodging (2 nights @ 139 + fees for Kim, and 2 or 3 for me depending on flight costs/availability later in the day on the 11th) 625 or 785
 Registration x1 (we have a complimentary registration) 275
 Incidental Travel costs (taxi uber shuttle etc) estimated 200 max

Total estimated costs 1,400 - 1,800

If you could provide a statement that SRG would like to Sponsor our participation and travel expenses including Registration fee, travel and lodging including a not to exceed statement if you'd like I think that would be enough to allow us to get approval for our paperwork and we can work out the logistics asap to follow.

Thank you so much!

Jonathan Decker

Technology Program Specialist
 SDPBC Educational Technology
 3300 Forest Hill Blvd Suite B-332
 West Palm Beach, FL 33406

Phone: 561-434-7447 Px: 47447

Gail Pierson <gail.pierson@srgtech.com>

To: "David C. Atwell" <david.atwell@palmbeachschools.org>, Jonathan Decker <jonathan.decker@palmbeachschools.org>, Kim Culp <kim.culp@palmbeachschools.org>

Cc: Gail Pierson <gail.pierson@srgtech.com>

Thu, Sep 23, 2021 at 9:49 AM

David, Kim, Jonathan,

SRG Technology (SRGT) is pleased to sponsor Paim's participation in the IMS Global Leadership Retreat this November 2021.

SRGT agrees to cover the Retreat Costs for Kim Culp and Jonathan Decker as outlined in the email below. We agree that Costs will include flights, lodging, registration and incidentals. Costs are estimated at a not-to-exceed \$2,000.

As you know, SRG Technology is in the process of officially joining IMS Global and this will be our first attendance at the conference as a member.

Best,
Gail

Gail Elizabeth Pierson
Chief Academic Officer
SRG Technology, LLC
PH 617-283-0651

[Quoted text hidden]

Disclaimer: Under Florida law, e-mail addresses are public records. If you do not want your e-mail address released in response to a public records request, do not send electronic mail to this entity. Instead, contact this office by phone or in writing.

Coretta Williams <coretta.williams@palmbeachschools.org>
To: Maria Telfair <maria.telfair@palmbeachschools.org>
Cc: "David C. Atwell" <david.atwell@palmbeachschools.org>

Fri, Sep 24, 2021 at 2:27 PM

Hi Ms. Telfair,

I have a question I need help with. I have a vendor (SRG) that is paying for two of our staff members to attend a conference out of state. They're mailing a check and sending a letter with what to do with the funds for the travel. Mr. Greg said a fund should be set up in the 1001 fund. It will be out of state travel so the account would be 533620 who would I have set up that account? Also, would the pay to the order on the check be to School district of Palm Beach County - Educational Technology? The memo would say travel for a conference? They will be sending a letter on what the funds are for. I need some guidance on who to reach out to, to set up the account. Mr. Greg said to contact you regarding the process. See the email below.

Thanks

----- Forwarded message -----

From: Greg Ostaffe <greg.ostaffe@palmbeachschools.org>
Date: Fri, Sep 24, 2021 at 9:22 AM
Subject: Re: IMS Global Retreat Sponsor/Partnership
To: Coretta Williams <coretta.williams@palmbeachschools.org>
Cc: Raymond Church <raymond.church@palmbeachschools.org>

Hi Coretta,

I suggest you estimate an amount for the trip and have the vendor send in a check for the agreed upon amount.

Get it added to a Fund 1001 line with the assumption there will be no residual. If there is, it should be minimal and the vendor should not expect a refund for any remaining amounts.

That is the cleanest way to do it.

Of course, there is a risk the funds do not get used because the conference is cancelled or some other personal reason.

Ideally you can have an agreement with the vendor that the funds will be used for next year's conference or someone else will go in your place. I recommend you try to avoid the refund part of the equation.

On Fri, Sep 24, 2021 at 9:06 AM Coretta Williams <coretta.williams@palmbeachschools.org> wrote:

Good morning gentlemen,

Question

Good morning, I have a question we are speaking with a vendor today who would like to sponsor two of our employees for travel to a conference out of state, they would like to write a check for \$4000 amount to the district to be added to Ed Tech account so the trip can be paid for. If the staff doesn't use it all can the vendor be get a check for the remaining amount that was not used? Are we allowed to get funds from the vendor and if so what is the process. The vendor wants to know the easiest way to pay for our team member's trip.

Thanks for any help you can provide.

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From: Migdalia Ramos <migdalia.ramos@palmbeachschools.org>
Date: Fri, Sep 24, 2021 at 8:59 AM
Subject: Re: IMS Global Retreat Sponsor/Partnership
To: Coretta Williams <coretta.williams@palmbeachschools.org>

Hi Coretta,

I really don't know, I think you should contact Budget.

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From: **Brooke Engelhaupt** <brooke.engelhaupt@palmbeachschools.org>

Date: Fri, Sep 24, 2021 at 8:35 AM

Subject: Re: IMS Global Retreat Sponsor/Partnership

To: Coretta Williams <coretta.williams@palmbeachschools.org>

Hi Coretta,

You may want to contact Migdalia Ramos about this since she handles misc pay/reimbursements. I am not familiar with the process of how you would go about getting a check cut back to the vendor or what would be required for that type of transaction. It sounds like a misc pay would be required and Dawn mentioned submitting a list of everything the vendor would cover but cutting a check back would be approved by Accounting and they should know what documentation would be required. :-)

Brooke Engelhaupt
School District of Palm Beach County
Budget Analyst, Budget Services A-306
Phone: 561-434-8846 PX 4-8846
Fax: 561-434-8568 PX 4-8568
Email: Brooke.Engelhaupt@PalmBeachSchools.org

On Thu, Sep 23, 2021 at 11:05 AM Coretta Williams <coretta.williams@palmbeachschools.org> wrote:

Hi Ms. Brooke,

Good morning. I have a question we are speaking with a vendor tomorrow who would like to sponsor two of our employees for travel to a conference out of the state, if they write a check for a certain amount to the district to be added to Ed Tech account so the trip can be paid for. If the staff doesn't use it all can the vendor be get a check for the remaining amount that was not used? Are we allowed to get funds from the vendor and if so what is the process. The vendor wants to know the easiest way to get the trips paid for.

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From: **Dawn Walton** <dawn.walton@palmbeachschools.org>

Date: Thu, Sep 23, 2021 at 10:46 AM

Subject: Re: IMS Global Retreat Sponsor/Partnership

To: Coretta Williams <coretta.williams@palmbeachschools.org>

Yes departments have had 3rd party sponsored workshops. You would need a letter from 3rd party detailing everything that is included and whether they are paying back the District or the Individual for expenses, or if it will be direct pay by the 3rd party. However if the vendor wants to reimburse the district you would need to have the funding to support the cost of the event until vendor reimbursement.

On Thu, Sep 23, 2021 at 10:16 AM Coretta Williams <coretta.williams@palmbeachschools.org> wrote:

Hi Ms. Dawn,

I did not know who to ask first so I am starting with you. We have a vendor who wants to sponsor 2 staff members to go to a conference but wants us to pay and reimburse us, is there a process for this? I know our funds can not support this because all our funds are allocated for future items. Have you all ever had vendor sponsor and reimburse the district. Please let me know.

Thanks for any help you can provide.

Coretta

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From: **Jonathan Decker** <jonathan.decker@palmbeachschools.org>

Date: Thu, Sep 23, 2021 at 10:10 AM

Subject: Fwd: IMS Global Retreat Sponsor/Partnership

To: Coretta Williams <coretta.williams@palmbeachschools.org>

SRG Sponsoring our Conference attendance

[Quoted text hidden]

Sincerely,

Coretta Williams,
Tech. Budget Senior



3300 Forest Hill Blvd., Suite B-332
West Palm Beach, Florida 33406
Phone (561) 969-5878 or PX 45878
Fax (561) 434-8392
Email coretta.williams@palmbeachschools.org

"Optimism is a happiness magnet. If you stay positive, good things and good people will be drawn to you."— Mary Lou Retton

From: on behalf of Jonathan Decker
Sent: Friday, September 24, 2021 9:41 AM
To: coretta.williams@palmbeachschools.org
Subject: Re: IMS Global Retreat Sponsor/Partnership
Attachments: image.png

10-4

On Fri, Sep 24, 2021 at 9:39 AM Coretta Williams <coretta.williams@palmbeachschools.org> wrote:
FYI below

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Subject: Fwd: IMS Global Retreat Sponsor/Partnership
To: Coretta Williams <coretta.williams@palmbeachschools.org>

SRG Sponsoring our Conference attendance

----- Forwarded message -----

From: **Gail Pierson** <gail.pierson@srgtech.com>
Date: Thu, Sep 23, 2021 at 9:49 AM
Subject: Fwd: IMS Global Retreat Sponsor/Partnership
To: David C. Atwell <david.atwell@palmbeachschools.org>, Jonathan Decker <jonathan.decker@palmbeachschools.org>, Kim Culp <kim.culp@palmbeachschools.org>
Cc: Gail Pierson <gail.pierson@srgtech.com>

David, Kim, Jonathan,

SRG Technology (SRGT) is pleased to sponsor Palm's participation in the IMS Global Leadership Retreat this November 2021.

SRGT agrees to cover the Retreat Costs for Kim Culp and Jonathan Decker as outlined in the email below. We agree that Costs will include flights, lodging, registration and incidentals. Costs are estimated at a not-to-exceed \$2,000.

As you know, SRG Technology is in the process of officially joining IMS Global and this will be our first attendance at the conference as a member.

Best,

Gail

Gail Elizabeth Pierson
Chief Academic Officer
SRG Technology, LLC
PH 617-283-0651

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Subject: IMS Global Retreat Sponsor/Partnership
To: Gail Pierson <gail.pierson@srgtech.com>
CC: David C. Atwell <david.atwell@palmbeachschools.org>, Kim Culp <kim.culp@palmbeachschools.org>

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We would like to submit our internal paperwork absolutely asap to get approval for our participation and to hopefully keep costs to a minimum. In order to submit the paperwork, we would require a statement from you indicating SRG's intention to cover the travel lodging and registration fee required.

For planning purposes, we intend to keep all costs as minimal possible and I think we would be realistically facing the following

Flights (considering two possible departure airports airport and and carry-on costs ets) we estimate somewhere between 300-500 total - and possibly less
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Registration x1 (we have a complimentary registration) 275
Incidental Travel costs (taxi uber shuttle etc) estimated 200 max

Total estimated costs 1,400 - 1,800

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Thank you so much!

From: on behalf of Karen Daughtery
Sent: Saturday, October 23, 2021 1:38 PM
To: jonathan.decker@palmbeachschools.org
Subject: Re: Can I buy your flights for Denver?

Any news? I am hoping it is GOOD news.

Karen Daughtery

K-12 Program Manager
IMS Global Learning Consortium
kdaughtery@imglobal.org
[Schedule a Meeting on my Calendar](#)
Mobile: 770-680-6631

CONFIDENTIALITY: This e-mail (including any attachments) may contain confidential, proprietary and privileged information, and unauthorized disclosure or use is prohibited.

On Wed, Oct 20, 2021 at 1:01 PM Jonathan Decker <jonathan.decker@palmbeachschools.org> wrote:
Hi Karen,

Not quite yet... the official approval to travel on a work day was denied, and I have requested to take personal time to make the trip and that request is being reviewed. If you don't hear from me before tomorrow, I am afraid we will consider it a no for the retreat.

Thanks for your support!

On Wed, Oct 20, 2021 at 12:58 PM Karen Daughtery <kdaughtery@imglobal.org> wrote:
Are you ready for me to buy your flights for Denver?

Karen Daughtery

K-12 Program Manager
IMS Global Learning Consortium
kdaughtery@imglobal.org
[Schedule a Meeting on my Calendar](#)
Mobile: 770-680-6631

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Jonathan Decker

Technology Program Specialist
SDPBC Educational Technology

From: on behalf of Jonathan Decker
Sent: Saturday, October 23, 2021 2:42 PM
To: kdaughtery@imglobal.org
Subject: Re: Can I buy your flights for Denver?

Hi Karen,

Thanks for checking in, but unfortunately, I won't be able to make it. Hopefully some policies may lighten in the future and travel will be approved again.

Thanks so much for the opportunity and I look forward to the next time.

On Sat, Oct 23, 2021, 1:38 PM Karen Daughtery <kdaughtery@imglobal.org> wrote:
Any news? I am hoping it is GOOD news.

Karen Daughtery

K-12 Program Manager
IMS Global Learning Consortium
kdaughtery@imglobal.org
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Mobile: 770-680-6631

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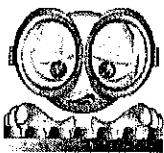
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María.Telfair@palmbeachschools.org (email)



[Quoted text hidden]

Coretta Williams <coretta.williams@palmbeachschools.org>
To: Brooke Engelhaupt <brooke.engelhaupt@palmbeachschools.org>
Cc: "David C. Atwell" <david.atwell@palmbeachschools.org>

Fri, Sep 24, 2021 at 3:09 PM

Hi Ms. Brooke,

Circling back to you. Are you able to set up an account for me we have a vendor (SRG) who is sponsoring travel for a conference for two of our team members out of state. They will be sending a check and a letter in regards to where the funds go. See the email below we need it set up in Department 9228 fund 1001 account 533620 because it will be out of state travel.

[Quoted text hidden]

Coretta Williams <coretta.williams@palmbeachschools.org>

Mon, Oct 18, 2021 at 10:32 AM

To: Greg Ostaffe <greg.ostaffe@palmbeachschools.org>
Cc: Raymond Church <raymond.church@palmbeachschools.org>, Brooke Engelhaupt <brooke.engelhaupt@palmbeachschools.org>, "David C. Atwell" <david.atwell@palmbeachschools.org>, "Adam Miller (Dir Ed Tech)" <adam.miller@palmbeachschools.org>, Migdalia Ramos <migdalia.ramos@palmbeachschools.org>

Hi all,

The check that came from IMS the TDE's were denied for the travel. Is there any way we can send the funds back for the TDE being denied? I am so sorry please if there is any way we can send the funds back.

Coretta

Your IMS Global Leadership Retreat grant has been set up below.

Available Budget

2,000,000

Dept	Department Name	Fund	Fund Description	Account	Account Description	Project	Project Description	Start Date	End Date	Budget Amount	Actual Amount	Balance	Percent Used	Percent Available
9228	Department 9228	1001	Fund 1001	533620	Account 533620					2,000,000		2,000,000	0%	100%

Please submit your check to Accounting with the below funding once you receive it.

On Fri, Sep 24, 2021 at 9:22 AM Greg Ostaffe <greg.ostaffe@palmbeachschools.org> wrote:

Hi Coretta,
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Brooke Engelhaupt
School District of Palm Beach County
Budget Analyst, Budget Services A-306
Phone: 561-434-8846 PX 4-8846
Fax: 561-434-8568 PX 4-8568
Email: Brooke.Engelhaupt@PalmBeachSchools.org

On Thu, Sep 23, 2021 at 11:05 AM Coretta Williams <coretta.williams@palmbeachschools.org> wrote:

Hi Ms. Brooke,

Good morning, I have a question we are speaking with a vendor tomorrow who would like to sponsor two of our employees for travel to a conference out of the state, if they write a check for a certain amount to the district to be added to Ed Tech account so the trip can be paid for. If the staff doesn't use it all can the vendor be get a check for the remaining amount that was not used? Are we allowed to get funds from the vendor and if so what is the process. The vendor wants to know the easiest way to get the trips paid for.
Thanks for any help you can provide.

----- Forwarded message -----

From: **Dawn Walton** <dawn.walton@palmbeachschools.org>
Date: Thu, Sep 23, 2021 at 10:46 AM
Subject: Re: IMS Global Retreat Sponsor/Partnership
To: Coretta Williams <coretta.williams@palmbeachschools.org>

Yes departments have had 3rd party sponsored workshops. You would need a letter from 3rd party detailing everything that is included and whether they are paying back the District or the Individual for expenses, or if it will be direct pay by the 3rd party. However if the vendor wants to reimburse the district you would need to have the funding to support the cost of the event until vendor reimbursement.

On Thu, Sep 23, 2021 at 10:16 AM Coretta Williams <coretta.williams@palmbeachschools.org> wrote:

Hi Ms. Dawn,

I did not know who to ask first so I am starting with you. We have a vendor who wants to sponsor 2 staff members to go to a conference but wants us to pay and reimburse us, is there a process for this? I know our funds can not support this because all our funds are allocated for future items. Have you all ever had vendor sponsor and reimburse the district. Please let me know.

Thanks for any help you can provide.

Coretta

----- Forwarded message -----

From: **Jonathan Decker** <jonathan.decker@palmbeachschools.org>
Date: Thu, Sep 23, 2021 at 10:10 AM
Subject: Fwd: IMS Global Retreat Sponsor/Partnership
To: Coretta Williams <coretta.williams@palmbeachschools.org>

SRG Sponsoring our Conference attendance

----- Forwarded message -----

From: **Gail Pierson** <gail.pierson@srgtech.com>
Date: Thu, Sep 23, 2021 at 8:49 AM
Subject: Fwd: IMS Global Retreat Sponsor/Partnership
To: David C. Atwell <david.atwell@palmbeachschools.org>, Jonathan Decker <jonathan.decker@palmbeachschools.org>, Kim Culp <kim.culp@palmbeachschools.org>
Cc: Gail Pierson <gail.pierson@srgtech.com>

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Brooke Engelhaupt <brooke.engelhaupt@palmbeachschools.org>

Mon, Oct 18, 2021 at 1:17 PM

To: Coretta Williams <coretta.williams@palmbeachschools.org>

Cc: Greg Ostaffe <greg.ostaffe@palmbeachschools.org>, Raymond Church <raymond.church@palmbeachschools.org>, "David C. Atwell" <david.atwell@palmbeachschools.org>, "Adam Miller (Dir Ed Tech)" <adam.miller@palmbeachschools.org>, Migdalia Ramos <migdalia.amos@palmbeachschools.org>

Hi Coretta,

Since the funds had restrictions, they would need to stay in the budget strip and can be spent down as specified in the award letter.

If the conference and travel costs are less than \$2,000.00, we would like the overage to be used for follow-up sharing, training and documentation for the ongoing implementation of IMS Global in Blender. In the event of a change in plans for this conference, these funds can also be used for future IMS Global event participation.

Thank you,

Brooke Engelhaupt
School District of Palm Beach County
Grants Budget Analyst, Budget Services A-306
Phone: 561-434-8846 PX 4-8846
Fax: 561-434-8568 PX 4-8568
Email: Brooke.Engelhaupt@PalmBeachSchools.org

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David C. Atwell <david.atwell@palmbeachschools.org>

Tue, Oct 19, 2021 at 1:51 PM

To: Brooke Engelhaupt <brooke.engelhaupt@palmbeachschools.org>

Cc: Coretta Williams <coretta.williams@palmbeachschools.org>, Greg Ostaffe <greg.ostaffe@palmbeachschools.org>, Raymond Church <raymond.church@palmbeachschools.org>, "Adam Miller (Dir Ed Tech)" <adam.miller@palmbeachschools.org>, Migdalia Ramos <migdalia.amos@palmbeachschools.org>

Sorry Team,

Approval to utilize these funds as directed in the award letter was denied through the CAO Office due to advisement from General Council. We cannot spend them in this way and therefore seek to return them. Please advise us on a mechanism to do so.

Thank you,

Dave
[Quoted text hidden]



David C. Atwell, Ph.D.
Director | 561-357-5948 | @AtwellDC



If the level of service I have provided is not a 10 please take a moment to fill out this anonymous survey to provide me with some critical feedback. Thank you.

Brooke Engelhaupt <brooke.engelhaupt@palmbeachschools.org>

Wed, Oct 20, 2021 at 8:39 AM

To: Coretta Williams <coretta.williams@palmbeachschools.org>, "David C. Atwell" <david.atwell@palmbeachschools.org>

Cc: Kristyn Yackey <kristyn.yackey@palmbeachschools.org>

Hi Coretta and David,

Kristyn Yackey will be reaching out to you regarding returning the funds.

Thank you,

Brooke Engelhaupt
School District of Palm Beach County
Grants Budget Analyst, Budget Services A-306
Phone: 561-434-8846 PX 4-8846
Fax: 561-434-8568 PX 4-8568
Email: Brooke.Engelhaupt@PalmBeachSchools.org

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Kristyn Yackey <kristyn.yackey@palmbeachschools.org>

Wed, Oct 20, 2021 at 8:55 AM

To: Coretta Williams <coretta.williams@palmbeachschools.org>, "David C. Atwell" <david.atwell@palmbeachschools.org>

Hi Coretta and David,

I have processed the check request and it will be going out tomorrow.

Thank you,
Kristyn
[Quoted text hidden]

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Kristyn Yackey
Accountant
School District of Palm Beach County
Budget Services Department
3300 Forest Hill Blvd, Suite A-306
West Palm Beach, FL, 33406
Tel. # 561-357-7665
Email: kristyn.yackey@palmbeachschools.org

Coretta Williams <coretta.williams@palmbeachschools.org>

Wed, Oct 20, 2021 at 8:58 AM

To: Gail Pierson <gail.pierson@srgtech.com>

Cc: Jonathan Decker <jonathan.decker@palmbeachschools.org>, "David C. Atwell" <david.atwell@palmbeachschools.org>

Hi Ms. Gail,

Happy Wednesday. Our accounting department is mailing the funds back for Ed Tech travel. Please let me know once you all receive the check.

Thanks

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Coretta Williams <coretta.williams@palmbeachschools.org>

Wed, Oct 20, 2021 at 8:59 AM

To: Kristyn Yackey <kristyn.yackey@palmbeachschools.org>

Cc: "David C. Atwell" <david.atwell@palmbeachschools.org>

Thank you for your help.

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Gail Pierson <gail.pierson@srgtech.com>

Wed, Oct 20, 2021 at 9:09 AM

To: Coretta Williams <coretta.williams@palmbeachschools.org>

Cc: "David C. Atwell" <david.atwell@palmbeachschools.org>, Gail Pierson <gail.pierson@srgtech.com>, Jonathan Decker <jonathan.decker@palmbeachschools.org>

Coretta,

Thank you for your note. However, I just want to point out that we were not expecting to receive the grant funds back. As we stated in our accompanying letter, we understand that circumstances intervene to change plans. We are happy to have you use the funds for another project. The funds are a grant.

Thank you,

Gail

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David C. Atwell <david.atwell@palmbeachschools.org>

Wed, Oct 20, 2021 at 9:34 AM

To: Gail Pierson <gail.pierson@srgtech.com>

Cc: Coretta Williams <coretta.williams@palmbeachschools.org>, Gail Pierson <gail.pierson@srgtech.com>, Jonathan Decker <jonathan.decker@palmbeachschools.org>

Good morning Gail,

We appreciate your flexibility on this, but due to the denial of the initial request, and in an effort to keep these things clean and clear we are proceeding with the refund.

Thank you,

Dave

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September 24, 2021

David Atwell, Director
Educational Technology Department
School District of Palm Beach County
3300 Forest Hill Blvd.Suite B-332
West Palm Beach, FL 33406

Activity #: 22-0004-I
OIG Staff: Watson
Date Rec'd: 1/19/21 Pages: 1
Rec'd: Watson
Redacted: Yes No N/A Req'd TBD
Exhibit/Reference #: 6

Dear David,

SRG Technology (SRGT) is pleased to sponsor participation for the School District of Palm Beach County in the IMS Global Leadership Retreat this November 2021.

SRGT agrees to cover the Retreat Costs for Kim Culp and Jonathan Decker. We agree that the Costs will include flights, lodging, registration and travel incidentals. Costs are estimated at a not-to-exceed of \$2,000.00, and we are enclosing a check for that amount.

If the conference and travel costs are less than \$2,000.00, we would like the overage to be used for follow-up sharing, training and documentation for the ongoing implementation of IMS Global in Blender. In the event of a change in plans for this conference, these funds can also be used for future IMS Global event participation.

As you know, SRG Technology is in the process of officially joining IMS Global and this will be our first attendance at the conference as a member.

Best regards,

Gail Elizabeth Pierson
Chief Academic Off

Activity #: 22-0004-I
OIG Staff: L. Ayson
Date Rec'd: 3/1/22 Pages: 4
Rec'd: Via Board Docs
Redacted: Yes No N/A Req'd TBD
Exhibit/Reference #: 7



SRG Technology Status Report for The School District of Palm Beach County

September 14, 2021



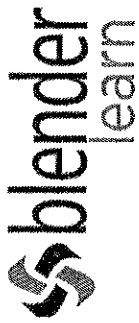
3/1/22

1/4



SDPBC & SRGT PARTNERSHIP

- RENEWED IN JULY 2021 – 3RD YEAR OF 3-YEAR AGREEMENT
- SOME HISTORY ...
 - 2014 Blender tools and database used to organize migrate Learning iVillage content
 - 2015 LV Content cleaned up and organized in Blender (complete July 2015)
 - 2015 Blender selected as Content Management System
 - 2015 SRGT & SDPBC Development Partnership launched
 - Blender Exchange also launched
 - 2015 Blender Phase 1 begins
 - Blender in use by 2016-2017 school year
 - 2018 Blender Phase 2 launched
- WHERE WE ARE NOW



SOW UPDATE

We continue work to deliver against the goals set out in our Statement of Work for our three-year agreement, and we can report progress against those as follows.

- CKE Editor implementation Complete. Additional upgrade scheduled for Q2.
- Content Library Underlying workspace architecture rewritten.
- New FL B.E.S.T. Standards Complete. CASE import for ELA is in PRO. Math is in UAT for testing.
- HTTPS Upgrade UAT Testing in September. Complete in PRO by October.
- Adoption Readiness HMM World language (LTI 2) & Benchmark (LTI 3) underway.
- LTI Advantage & enhancements LTI3 & LTI Advantage programming begun.
- New Blender User Interface Programming underway with dedicated developer.
- Reporting Power BI Report viewer integration due December 2021.
SRGT Search underway for “white label” package
- Google Integration Phase 1 complete.
Phase 2 Collections & tagging underway
Phase 2 Google Classroom Assignment tbd



BLENDER 2020-2021 TECHNOLOGY & SECURITY REFRESH

In 2020 through 2021, SRG has completed a significant technology refresh aimed at,

- 1) staying up-to-date with all industry infrastructure and software;
- 2) increased security;
- 3) better performance; and
- 4) setting the stage for the new Blender user interface.

March 2020 ongoing

Upgrade for the Blender platform from Microsoft .Net Framework, to the latest MS .Net Core platform.

July 2020 - September 2021

Upgrade of Blender application suite to 21.3, focused on,
— Workspace rewrite, Content Management upgrade,
Customer controls additions, Collections Phase 2

October 2020 – July 2021

Blender ecosystem & SRGT server farm to IBM Cloud Services
— Palm Beach Blender servers moved June 25, 2021

March – July 2021

Technology & Security Refresh

— Blender internal modules upgraded: CKEditor, Java, React, Bootstrap, Angular, etc.

October 2021

Upgrade of Customer sites to the new Blender 21.3
— Tested in SDDOE Statewide Blender site
— Scheduled for SDPBC deployment in Q2 2021