



THE SCHOOL DISTRICT OF  
PALM BEACH COUNTY, FLORIDA

LUNG CHIU, CIG, CPA  
INSPECTOR GENERAL

OFFICE OF INSPECTOR GENERAL  
3318 FOREST HILL BLVD., C-306.  
WEST PALM BEACH, FL 33406  
(561) 434-7335 FAX: (561) 434-8652  
[www.palmbeachschools.org](http://www.palmbeachschools.org)  
Hotline: (855) 561-1010

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## MEMORANDUM

**TO:** Honorable Chair and Members of the School Board  
Dr. Donald E. Fennoy, Superintendent  
Chair and Members of the Audit Committee  
*RLC*

**FROM:** Lung Chiu, Inspector General

**DATE:** April 10, 2019

**SUBJECT:** Transmittal of Final Whistle-Blower Investigative Report *Case # 19-848 - Inappropriate Use of Instructional Materials Funds for the Purchase of i-Ready*

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In accordance with *School Board Policy 1.092*, we hereby transmit the findings of the above-referenced final investigative report.

The report addresses an allegation that the District inappropriately used \$2 million in instructional materials funds for the purchase of i-Ready. The OIG determined the allegation was unsubstantiated.

The report is finalized and will be posted on the Inspector General's website; [https://www.palmbeachschools.org/departments/inspector\\_general\\_s\\_office](https://www.palmbeachschools.org/departments/inspector_general_s_office).



**SCHOOL DISTRICT OF PALM BEACH  
COUNTY  
OFFICE OF INSPECTOR GENERAL**



Donald E. Fennoy, II, Ed. D.  
Superintendent

**INVESTIGATIVE REPORT**

K. Lung Chiu, CPA  
Inspector General

**Case Number:**

19-848

**Date of Complaint:**

September 28, 2018

**Complainant:**

Whistleblower

**Subjects:**

District Management

**Witnesses:**

Diana Fedderman, Assistant Superintendent of Teaching and Learning

Bruce Harris, Assistant General Counsel

Keith Oswald, Deputy Superintendent/Chief of Schools

Julieann Rico, General Counsel

**Type of Report:**

FINAL

**AUTHORITY**

*School Board Policy 1.092* provides for the Inspector General to receive and consider complaints, and conduct, supervise, or coordinate such inquiries, investigations, or reviews, as the Inspector General deems appropriate.

This investigation was conducted by Senior Investigator Veronica Vallecillo in compliance with the *Quality Standards for Investigations, Principles and Standards for Offices of Inspector General*, promulgated by the Association of Inspectors General.

**INTRODUCTION**

On September 28, 2018, the Office of Inspector General (OIG) received a complaint that in 2016 the District inappropriately used \$2 million in Instructional Materials Funds for the purchase of i-Ready<sup>1</sup>.

<sup>1</sup> i-Ready combines web-based diagnostics, growth monitoring, standard mastery, and progress monitoring assessments with instructional resources personalized to each child's specific academic needs. i-Ready is sold by Curriculum Associates, LLC.

On October 15, 2018, the Inspector General reviewed the allegations and determined the complainant's allegation did rise to the level to be considered under the Whistleblower's Act in accordance with *School Board Policy 3.28* and *Florida Statute 112.3187*. As such, the OIG opened an investigation; and subsequently concluded the allegation as unsubstantiated.

## BACKGROUND

As required by *School Board Policy 8.122 Textbooks and Instructional Materials*, the School Board has the constitutional duty and responsibility to select and provide adequate instructional materials for all students.

The policy outlines procedures that shall be used to evaluate and recommend instructional materials for District adoption, including the funding allocation and expenditure in accordance to Florida Statute Chapter 1006.

The District creates Instructional Materials Adoption Committees based on core subjects being reviewed annually that coincides with the State's adoption process. The materials submitted for possible adoption are to be evaluated by the committees using pre-established criteria. All committee recommendations must be reviewed by relevant District administrative staff for appropriateness and assurance that the materials meet District curricular objectives. The final recommendations, along with any citizen comments, are forwarded by the Chief Academic Officer to the Superintendent for review and approval. Subsequent to Superintendent approval, the recommendations are submitted to the School Board for final approval and adoption.

The Florida Education Finance Program (FEFP) provides the primary funding source for operating Florida school districts. *Categorical programs funds* and any special allocations are added to the Net State FEFP Allocation to obtain the total State funding. *Instructional Materials* allocation is part of the FEFP funding.

## ALLEGATION AND FINDINGS<sup>2</sup>

The District inappropriately used \$2 million in Instructional Materials Funds for the purchase of i-Ready. *Unsubstantiated*.

## GOVERNING DIRECTIVES

- **Florida Statute 1006.28, Duties of district school board, district school superintendent; and school principal regarding K-12 instructional materials.**
- **Florida Statute 1006.283, District school board instructional materials review process.**
- **Florida Statute 1006.31, Duties of the Department of Education**

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<sup>2</sup> The OIG findings were determined using the standards that appear on the signature page at the end of this report.

- **Florida Statute 1006.34, Powers and duties of the commissioner and the department in selecting and adopting instructional materials.**
- **Florida Statute 1006.40, Use of instructional materials allocation; instructional materials, library books, and reference books; repair of books.**
- **School Board Policy 8.122, Textbooks and Instructional Materials.**
- **School Board Policy 3.28, Whistleblower Policy.**
- **Florida Department of Education Policies and Procedures Specifications for the Florida Instructional Materials Adoption.**

**ALLEGATION: EVIDENCE & TESTIMONY**

*Allegation: The District inappropriately used \$2 million in instructional materials funds for the purchase of i-Ready.*

**Testimony of Diana Fedderman, Assistant Superintendent of Teaching and Learning**

Ms. Fedderman confirmed she attended a meeting regarding the purchase of i-Ready. Ms. Fedderman noted she does not recall the time period of the meeting, but does recall the meeting took place in the Legal Department's conference room. Ms. Fedderman said that General Counsel Juliann Rico, Assistant General Counsel Bruce Harris, former Library Media Support Manager Bill Purtell, former Chief Academic Officer Keith Oswald (current Deputy Superintendent), and former Deputy Superintendent David Christiansen attended the meeting.

Ms. Fedderman stated that during the meeting there was debate over the interpretation of the Florida Statute 1006.283 related to the expenditure of Instructional Materials Funds and how it related to the purchase of i-Ready. Ms. Fedderman explained that there were discussions regarding the portion of a statute referring to core materials and also the requirements of an adoption process. Ms. Fedderman stated that the determining factor was that as long as all the core materials had already been purchased, it would be acceptable to use Instructional Materials Funds to purchase i-Ready and not have to go through the standard adoption process. Ms. Fedderman said that i-Ready is not a core material, rather it is supplemental. Ms. Fedderman said that Attorney Bruce Harris interpreted the statute differently, but noted that the other attorneys did not agree with Mr. Harris. Ms. Fedderman confirmed that all core materials were purchased prior to the purchase of i-Ready.

Ms. Fedderman stated that the Florida Department of Education (FDOE) was contacted for clarification on the statute and the use of Instructional Materials Funds to purchase i-Ready. Ms. Fedderman said that FDOE advised that it was the District's decision. Ms. Fedderman noted it would have probably been Dr. Christiansen who made the final call regarding the use of the funds.

**Testimony of Bruce Harris, Assistant General Counsel**

Mr. Harris stated that he attended a meeting on October 19, 2016, regarding i-Ready. Mr. Harris noted the meeting was scheduled for 11:30AM until 12:00 PM. Mr. Harris stated that Julie Ann Rico, Keith Oswald, Diana Fedderman, Bill Purtell, and Assistant General Counsel Denise

Sagerholm were invited to the meeting. Mr. Harris has no recollection of Ms. Sagerholm attending the meeting. Mr. Harris noted that Chief Financial Officer Mike Burke may have been in attendance although he was not listed as an attendee. Mr. Harris explained the meeting was regarding Instructional Materials Funds and a parent that did not want their child to use i-Ready. Mr. Harris stated that the Office of General Counsel recommended that the purchase of i-Ready, which had already taken place, not be funded using Instructional Materials Funds and that another source should be used. Mr. Harris noted he does not recall the reasons for the recommendation or what was discussed with that regard.

Mr. Harris stated he has no recollection of attending other meetings regarding i-Ready or the purchase prior to the October 19, 2016, meeting.

Mr. Harris stated he may have followed up with Keith Oswald<sup>3</sup>, via email, regarding the recommendation made at the October 19, 2016, meeting. Mr. Harris stated he did not have knowledge of how much the purchase of i-Ready was in 2016 and was not involved in the legal review process of the purchase.

#### **Testimony of Juliann Rico, General Counsel**

Ms. Rico stated she does not have any recollection of a meeting that took place in April 2016 regarding i-Ready and the use of Instructional Materials Funds. Ms. Rico said that she only remembers an executive meeting or possibly an agenda conference meeting where she advised that an i-Ready contract should go through legal review before it went to the Board. Ms. Rico noted the meeting was last minute and she insisted legal review should be completed. Ms. Rico explained that Attorney Kim Hall reviewed the contract and provided a legal checklist.

Ms. Rico stated that although she knows there are Instructional Materials Fund requirements, she would not have opined or performed a review of the requirements. Ms. Rico said that is something she would have assigned her staff to research. Ms. Rico stated she does not know if anyone in her office performed such research.

#### **Testimony of Keith Oswald, Deputy Superintendent/Chief of Schools**

Mr. Oswald stated that at the time the i-Ready purchase was done, Dr. David Christiansen was the Deputy Superintendent. Mr. Oswald explained that research was performed on various adaptive technologies. Mr. Oswald said that Dr. Christiansen wanted to move towards i-Ready. Mr. Oswald noted that the purchase was not completed during an official adoption cycle for mathematics or language.

Regarding School Board Policy 8.122, Mr. Oswald explained that there are categorical dollars that can be spent in other areas like dual enrollment and damaged/lost books without having to go through the standard adoption process. Mr. Oswald did not believe the purchase of i-Ready

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<sup>3</sup> The OIG reviewed District email records that indicate that on August 2, 2017, Mr. Harris sent Mr. Oswald a follow up email.

required the completion of an adoption process. Mr. Oswald stated that since i-Ready supports the classrooms, the purchase was appropriate.

Mr. Oswald stated that Attorney Bruce Harris disagreed with their interpretation of the process and relevant policies regarding the use of Instructional Materials Funds. Mr. Oswald does not recall why Mr. Harris disagreed. Mr. Oswald noted that several meetings took place regarding the purchase of i-Ready, but he does not recall what the final recommendation and conclusion from Legal was regarding the use of Instructional Materials Funds.

### **Documentation Reviewed**

Based on the Florida Education Finance Program (FEFP) 2016/2017 calculation, the Palm Beach County School District received \$15,282,311 in State funding for instructional materials (**Exhibit 1**).

The School District follows the textbook adoption process from the Florida Department of Education (FDOE). FDOE issued a memorandum dated May 1, 2015, regarding the announcement of the 2015-2016<sup>4</sup> instructional materials adoption. The adoption called for bids in K-12 World Languages, Career and Technical Education, K-8 Physical and Health Education, and K-12 Visual and Performing Arts.

The February 17, 2016, School Board Agenda included a recommendation to the Board to approve the FY 17 Instructional Materials Program budget. The budget reflects all adoption materials were budgeted for. Additionally, the budget reflects \$2,150,154 for adaptive technology reading and mathematics (**Exhibit 2**).

The School Board Agenda dated May 11, 2016, reflects the purchase of i-Ready Diagnostics and Instruction for Reading and Mathematics Grades K-5. The purchase was approved by the School Board (**Exhibit 3**). The details of the agenda item reflect that:

- The agreement with Curriculum Associates, LLC. was for the 2016/2017, 2017/2018, and 2018/2019 School Years.
- The total amount of purchase was \$5,601,822.
- The source of the funds were Instructional Materials and Digital Classroom Allocation Categorical Appropriation.

Payment records from PeopleSoft indicate that Curriculum Associates was paid \$5,601,822 during 2016 through 2018. Please see below.

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<sup>4</sup> The announcement was done in 2015 to for adoption process in 2016/2017.

Date	Funding Source	Amount
7/26/2016	Instructional Materials	\$2,000,000.00
9/16/2016	Digital Classroom	\$1,000,000.00
9/26/2017	Digital Classroom	\$1,300,911.00
8/31/2018	Digital Classroom	\$1,300,911.00
<b>Total</b>		<b>\$5,601,822.00</b>

**Review of Applicable Statutes and School Board Policies**

*Florida Statute 1006.28 (2)(a): Duties of district school board, district school superintendent; and school principal regarding K-12 instructional materials states that:*

“Each district school board is responsible for the content of all instructional materials and any other materials used in a classroom, made available in a school library, or included on a reading list, whether adopted and purchased from the state-adopted instructional materials list, adopted and purchased through a district instructional materials program under s. 1006.283, or otherwise purchased or made available.”

*Florida Statute 1006.283(1): District school board instructional materials review process states “A district school board or consortium of school districts may implement an instructional materials program that includes the review, recommendation, adoption, and purchase of instructional materials. The district school superintendent shall certify to the department by March 31 of each year that all instructional materials for core courses used by the district are aligned with applicable state standards.”*

*Florida Statute 1006.40: Use of instructional materials allocation; instructional materials, library books, and reference books; repair of books*

(3)(a) Except for a school district or a consortium of school districts that implements an instructional materials program pursuant to s. 1006.283, each district school board shall use the annual allocation only for the purchase of instructional materials that align with state standards and are included on the state-adopted list, except as otherwise authorized in paragraphs (b) and (c).

(b) Up to 50 percent of the annual allocation may be used for:

1. The purchase of library and reference books and nonprint materials.
2. The purchase of other materials having intellectual content which assist in the instruction of a subject or course. These materials may be available in bound, unbound, kit, or package form and may consist of hardbacked or softbacked textbooks, novels, electronic content, consumables, learning laboratories, manipulatives, electronic

media, computer courseware or software, and other commonly accepted instructional tools as prescribed by district school board rule.

3. The repair and renovation of textbooks and library books and replacements for items which were part of previously purchased instructional materials.

(c) District school boards may use 100 percent of that portion of the annual allocation designated for the purchase of instructional materials for kindergarten, and 75 percent of that portion of the annual allocation designated for the purchase of instructional materials for first grade, to purchase materials not on the state-adopted list.

*School Board Policy 8.122: Textbook and Instructional Materials* (last revised on January 24, 2018). Prior to its revision, the policy stated:

“As stated in Fla. Stat. § 1006.40(3)(c), the District may use up to 100 percent of that portion of the annual allocation designated for the purchase of instructional materials for kindergarten, and 75 percent of that portion designated for the purchase of instructional materials for first grade, to purchase materials not on the State-adopted list. Any portion of State allocated funds for textbooks not expended for textbooks or not otherwise designated by legislative authority for library/media materials shall be expended on library and reference books and for the repair and renovation of textbooks and library books.”

“To the extent required by Fla. Stat. §1006.40 (7), in any year in which the total instructional materials allocation for the District, including the portion designated for library media materials and science laboratory supplies, has not been expended or obligated prior to June 30, the School Board shall carryforward the unobligated amount and shall add it to the next year’s allocation, but the District maintains flexibility with this provision if allowed by statute.”

“Any request from a school center to use textbooks or other related instructional materials as part of the curriculum and which are not District adopted, per se, must be approved by the Superintendent or designee based on the appropriateness of the materials to meet District curricular objectives. Any request for funding of such materials must be approved by the Superintendent or designee.”

*Florida Department of Education Policies and Procedures Specifications for the Florida Instructional Materials Adoption* state that Florida adopts the major tool of instruction, along with priced ancillary materials which are designed to work with the major tools. The major tool is comprised only of items necessary to meet the standards. For purposes of adoption, supplementary materials are defined as supporting materials that do not qualify as the major tool and are not designed to accompany the specific major tool with which they were submitted, but could be used



with any publisher's materials. Florida does not have a process for the adoption of supplementary materials.

The OIG reviewed District email records that reflect an email dated October 21, 2016, with subject "IM Categorical Funds". The email<sup>5</sup> was composed by former Library Media Support Manager Bill Purtell, which stated

*"I spoke with Katrina Figgett again last night. She is in agreement that there is a gray area when it comes to "Do all materials purchased with IM Categorical Dollars (core, intervention, or supplemental) need to go through the process as stated in Statutes 1006.28 or 1006.283?"*

*Like the Senator, She also stated that she would agree that once all core programs are purchased, excess funds may be used in accordance with Florida Statute 1006.40. Since library books and reference materials come out of the IM Categorical and they don't need to go through an adoption process, she feels supplemental programs would fit under this category as long as we have purchased all of our core programs first.*

*I told her we tried calling her legal department and she stated that most likely they would ask her for her interpretation of the statutes. She also stated that the FDOE Legal Department doesn't interpret statutes and would defend our interpretation of the statute as stated above."*

## CONCLUSION

The investigation revealed that funds were available in the budget to spend \$2 million to purchase i-Ready, after the purchase of core materials. Additionally, State Statute and District policy does not prohibit the use of Instructional Materials Funds for i-Ready, after the core materials have been purchased. Based on testimony obtained and documentation reviewed, the OIG determined that the allegation that the District inappropriately used \$2 million in instructional material funds for the purchase of i-Ready was *Unsubstantiated*.

## AFFECTED PARTY NOTICE

In accordance with *Florida Statute 112.3189*, on March 7, 2019, the complainant was notified of the investigative findings and provided with an opportunity to submit a written response to these findings. On April 4, 2019, the complainant confirmed a response would not be submitted to the OIG.

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<sup>5</sup> This email was composed by Katrina Figgett who, at the time, was the Director of Instructional Materials and Library Media at FDOE

**DISTRIBUTION**

Dr. Donald E. Fennoy II, Superintendent<sup>6</sup>  
Palm Beach County School Board Members  
Audit Committee Members  
OIG file

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<sup>6</sup> As required by School Board Policy 3.28 Whistleblower Protection Policy, the Inspector General will present the findings to the Superintendent, the Superintendent shall reach a decision regarding the complaint and shall communicate the decision to the complainant and the person(s) accused of violating this policy.


**Investigation Conducted by:**

Veronica Vallecillo, CIGI

  
\_\_\_\_\_  
4/9/19  
Date

**Investigation Supervised by:**

Oscar Restrepo, CIGI, Director of Investigations

  
\_\_\_\_\_  
4/9/19  
Date

**Investigation Approved by:**

K. Lung Chiu, CIG, Inspector General

  
\_\_\_\_\_  
4-9-19  
Date

*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.*



District	ESE		Supplemental	DJJ		Instructional		Transportation	Teachers Classroom Supply Assistance
	Safe Schools	Guaranteed Allocation	Academic Instruction	Reading Allocation	Supplemental Allocation	Materials			
	-1-	-2-	-3-	-4-	-5-	-6-	-7-	-8-	
1 Alachua	807,979	11,729,036	8,301,932	1,314,829	221,590	2,403,715	3,729,822	470,225	
2 Baker	124,266	1,173,133	1,898,963	312,289	0	389,741	1,256,534	78,350	
3 Bay	738,018	9,358,702	8,048,850	1,296,246	171,518	2,250,825	3,856,873	445,211	
4 Bradford	110,466	1,281,348	927,629	244,112	0	274,012	732,929	48,323	
5 Brevard	1,607,047	29,701,296	19,437,414	3,265,960	174,440	6,213,526	10,170,297	1,180,342	
6 Broward	5,892,889	96,548,081	61,715,009	12,085,543	405,307	21,666,090	32,467,605	4,414,136	
7 Calhoun	86,409	867,502	491,046	201,325	0	177,084	452,796	34,907	
8 Charlotte	364,117	6,342,259	3,441,647	776,488	0	1,328,779	3,225,189	253,554	
9 Citrus	340,441	6,839,730	3,293,586	723,454	155,489	1,208,847	3,651,487	242,920	
10 Clay	603,362	12,029,322	9,789,556	1,704,852	120,024	3,071,217	7,065,672	607,744	
11 Collier	746,694	21,582,832	10,548,135	2,177,020	151,183	3,861,367	7,110,798	748,295	
12 Columbia	284,005	4,266,489	3,868,159	614,831	0	814,200	2,036,379	166,124	
13 Miami-Dade	9,906,212	138,215,310	118,929,824	15,723,227	588,529	27,425,699	20,485,884	5,797,173	
14 DeSoto	163,915	2,168,668	1,843,271	317,579	47,764	405,158	814,015	79,031	
15 Dixie	106,678	590,410	480,252	201,309	0	193,486	583,156	34,830	
16 Duval	3,476,486	49,933,091	33,172,777	5,708,925	411,801	10,204,081	19,361,072	2,106,876	
17 Escambia	1,209,089	14,796,909	11,112,642	1,790,258	203,351	3,105,022	9,987,553	653,992	
18 Flagler	276,694	6,107,160	2,747,902	629,550	0	1,061,329	2,584,413	208,862	
19 Franklin	84,364	472,989	282,035	164,464	0	119,096	338,638	19,727	
20 Gadsden	167,560	1,770,572	1,446,431	326,973	0	427,143	1,505,711	86,381	
21 Gilchrist	94,669	1,043,143	582,642	224,935	0	229,918	455,540	43,375	
22 Glades	84,570	595,951	314,529	184,537	0	140,271	210,959	27,504	
23 Gulf	96,452	200,519	361,009	192,432	0	155,136	376,631	30,236	
24 Hamilton	101,948	558,632	348,323	178,861	0	129,391	321,650	28,032	
25 Hardee	143,854	1,892,738	1,170,405	329,448	0	422,518	1,115,575	85,396	
26 Hendry	202,591	2,483,111	1,579,146	417,602	0	602,244	1,484,036	116,242	
27 Hernando	486,415	9,508,779	5,331,692	1,041,601	0	1,802,413	4,923,771	360,147	
28 Highlands	319,514	4,352,517	2,741,279	806,914	0	990,982	2,523,970	200,063	
29 Hillsborough	3,468,696	83,029,664	50,348,251	9,285,475	557,848	16,808,248	33,027,065	3,461,420	
30 Holmes	105,597	1,087,777	693,347	238,953	0	258,631	720,454	51,576	
31 Indian River	400,948	5,387,030	4,008,821	863,165	0	1,407,091	3,709,599	283,497	
32 Jackson	165,426	2,332,829	1,297,241	369,724	43,258	531,253	1,555,457	105,810	
33 Jefferson	86,900	481,110	310,336	143,546	0	61,204	174,925	12,513	
34 Lafayette	75,495	256,295	209,861	163,037	0	105,267	193,770	19,467	
35 Lake	835,185	14,018,122	10,306,694	1,881,812	0	3,275,296	8,746,521	683,606	
36 Lee	1,657,314	41,513,484	19,780,383	4,050,788	273,822	7,460,475	22,302,662	1,501,553	
37 Leon	1,150,799	17,826,620	9,804,288	1,533,766	150,097	2,714,758	4,906,508	549,697	
38 Levy	125,667	2,033,306	1,262,213	337,350	0	438,399	1,470,855	86,597	
39 Liberty	75,655	524,000	286,427	172,896	200,222	110,946	285,116	22,322	
40 Madison	114,842	1,290,420	726,086	218,590	104,350	250,022	588,271	43,352	
41 Manatee	1,113,373	20,875,196	11,453,196	2,179,738	239,925	4,039,473	7,218,702	781,612	
42 Marion	863,759	16,445,833	13,287,102	1,836,774	253,694	3,463,001	10,199,529	689,587	
43 Martin	376,547	7,257,342	4,137,579	939,380	40,447	1,718,120	2,858,809	311,636	
44 Monroe	308,378	3,144,392	1,794,268	472,598	0	671,334	1,043,988	131,847	
45 Nassau	223,867	3,232,002	2,548,294	601,346	0	1,008,100	2,784,673	187,847	
46 Okaloosa	611,957	12,460,632	8,639,442	1,436,961	277,037	2,598,033	6,427,915	498,026	
47 Okeechobee	190,314	2,895,208	1,968,870	379,019	241,973	518,465	1,643,677	106,670	
48 Orange	4,911,991	58,387,568	47,182,474	8,929,336	442,897	16,645,431	29,151,501	3,263,321	
49 Osceola	1,074,290	17,480,735	13,414,370	2,774,436	50,076	5,290,513	11,384,368	1,029,040	
50 Palm Beach	4,232,604	72,914,281	40,288,272	8,706,546	256,164	15,282,311	27,334,051	3,066,673	
51 Pasco	1,341,031	30,166,376	20,492,081	3,183,286	176,840	8,109,572	15,833,200	1,163,556	
52 Pinellas	3,119,448	45,705,310	23,235,021	4,514,177	415,377	8,143,295	12,387,695	1,662,882	
53 Polk	1,945,171	36,432,411	25,156,658	4,322,609	361,369	8,516,555	22,428,136	1,636,440	
54 Putnam	293,431	3,537,962	2,980,682	556,566	0	870,377	2,521,806	176,513	
55 St. Johns	597,120	12,108,085	7,523,430	1,748,686	290,284	3,402,865	8,992,425	609,471	
56 St. Lucie	764,651	16,643,373	10,268,507	1,768,349	158,240	3,352,963	9,502,083	627,008	
57 Santa Rosa	378,181	9,639,098	7,843,051	1,232,711	0	2,404,096	6,510,316	429,647	
58 Sarasota	960,302	23,207,480	8,686,853	2,016,533	0	3,607,187	6,340,545	694,084	
59 Seminole	1,226,116	20,408,917	16,440,045	2,976,865	0	5,340,404	11,477,222	1,093,326	
60 Sumter	199,604	3,601,723	1,679,542	449,783	0	696,462	1,008,878	135,502	
61 Suwannee	157,778	444,538	1,254,668	348,475	0	475,422	1,321,508	98,383	
62 Taylor	111,461	1,038,294	595,960	218,180	0	226,396	513,189	42,493	
63 Union	88,592	602,273	510,894	208,137	41,515	200,503	466,117	37,396	
64 Volusia	1,672,868	23,976,185	16,816,575	2,737,166	244,779	4,994,057	10,583,144	1,035,939	
65 Wakulla	140,819	1,592,416	960,914	323,449	0	433,097	1,727,706	82,611	
66 Walton	229,564	2,690,762	1,509,558	474,046	52,526	840,374	2,178,319	145,122	
67 Washington	109,490	755,923	869,091	240,236	0	266,833	836,142	51,840	
68 Washington Special	1,178	38,781	85,469	121,211	193,524	13,020	0	2,776	
69 FAMU Lab School	66,305	22,164	313,477	135,542	0	48,237	0	7,572	
70 FAU - Palm Beach	70,690	108,695	294,989	162,853	0	285,774	0	17,642	
71 FAU - St. Lucie	72,775	182,590	424,016	174,421	0	107,860	0	23,136	
72 FSU Lab - Broward	67,578	169,506	143,360	145,020	0	52,793	0	11,324	
73 FSU Lab - Leon	74,793	318,029	286,444	183,869	0	139,884	0	27,940	
74 UF Lab School	70,773	238,773	297,715	161,701	0	99,964	0	18,680	
75 Virtual School	0	410,757	0	1,425,529	0	2,434,971	0	0	

Total 64,456,019 1,055,304,496 706,662,699 130,000,000 7,717,261 228,792,422 435,164,782 45,286,750



### Agenda Item Details

Meeting	Feb 17, 2016 - 2. REGULAR BOARD MEETING at 5 p.m. in the Board Room
Category	14. Consent Agenda
Subject	TL2 - K-12 Arts Education and 6-12 Career Technology Education Adoption
Type	Action (Consent)
Recommended Action	I recommend the Board approve the FY17 Instructional Materials Program budget and the list of instructional materials for the District adoption periods indicated with the ability to purchase with a spend limit in accordance with attachment B.

#### DESCRIPTION:

Pursuant to School Board Policy 8.122 (3), District Instructional Materials Adoption Committees were convened during 2015-2016 to evaluate and recommend new materials for adoption in the areas of Arts Education and Career Technology Education for grades K-12. Committee membership included: classroom teachers and coaches, school level administrators, district level curriculum administrators (literacy, ESE, multicultural, African and African American, Latino, and Gender Studies), resource teachers, and lay persons. Committees reviewed all instructional materials programs submitted for district adoption and some additional submissions that were considered appropriate for committee review. Titles recommended for district adoption are contained in Attachment A.

The committees have made recommendations for Arts Education, Family Consumer Science, Medical Science, Business Technology, Industrial Arts/STEM Education and American Sign Language instructional materials that best meet the demands of the state standards that correspond to these subjects. The materials selected are designed to meet the diverse needs of all students in Palm Beach County. It has been nearly ten years since instructional materials were adopted for use in these courses, and the materials teachers are currently using are outdated and do not adequately reflect the curriculum, assessments and technology necessary for students to be successful in today's classrooms. The newly selected materials include the use of Florida Standards, relevant curriculum topics and contexts, appropriate assessments, and integrated technology. These new materials will support teachers in designing instruction to meet the needs of all learners and will be provided in both print and online formats as available.

The FY17 Instructional Materials Cost Analysis (Attachment B) represents estimated costs for implementation of new adoptions. Funding is provided from the projected FY17 State Categorical Allocation. The projected FY17 State Categorical Allocation figure is an estimation and actual funding is subject to legislative appropriation.

The Instructional Materials Department has worked closely with publishers resulting in competitive pricing to help ensure a complete K-12 Arts Education, 9-12 Family Consumer Science, 6-12 Medical Science, 6-12 Business Technology, 6-12 Industrial Arts/STEM Education and 9-12 American Sign Language implementation.

Staff development for instructional materials will be provided at no cost to the District by publishers for the life of the adoption (5 years) and will be focused on the appropriate use of materials to implement the Florida Standards.

#### CONTACT:

David Christiansen, Ed.D., Deputy Superintendent/Chief of Schools (david.christiansen@palmbeachschools.org)  
 Keith Oswald, Chief Academic Officer  
 Karen Whetsell, Assistant Superintendent Teaching and Learning

#### FINANCIAL IMPACT:

The financial impact to the General Fund budget is \$12,791,364. The source of funds is the FY17 Instructional Materials Categorical appropriation.


The FY17 fiscal year spend with the Florida School Book Depository (FSBD) will not exceed \$8,500,000, John Wiley Publishing will not exceed \$500,000, Pearson Publishing will not exceed \$500,000, McGraw-Hill Publishing will not exceed \$300,000, Goodheart Wilcox will not exceed \$325,000, Davis Publishing will not exceed \$300,000, Scholastic will not exceed \$600,000, and Booksmart (Dual Enrollment) will not exceed \$725,000. The balance of approved funds will be spent with various vendors, but none will exceed the \$250,000 threshold.

SCHOOL BOARD GOALS: (Check all that apply.)

- 1. Student First Philosophy
- 2. Family Matters
- 3. Qualified and Highly Effective Workforce
- 4. Efficiency and Accountability
- 5. Community Engagement
- 6. Communication

 [FY17 Attachment A.pdf \(103 KB\)](#)

 [FY17 Attachment B.pdf \(120 KB\)](#)

 [Q&A TL2.1.pdf \(87 KB\)](#)

**Attachment B**

FY17 Implementations	
<b>FY16 Carry Over:</b>	
9-12 Mathematics	\$1,500,000.00
<b>New Adoptions:</b>	
<b>I. World Languages:</b>	
9-12 American Sign Language	\$150,000.00
<b>II. Career Tech Education:</b>	
9-12 Family Consumer Science	\$300,000.00
9-12 Criminal Justice Education	\$21,364.00
6-12 Medical Science Education	\$325,000.00
6-12 Business Technology	\$650,000.00
6-12 Industrial Arts/STEM Education	\$250,000.00
<b>III. Arts Education:</b>	
K-5 Music	\$1,000,000.00
6-12 Music	\$650,000.00
K-5 Art	\$600,000.00
6-12 Art	\$500,000.00
<b>IV. Gap Year Science:</b>	
K-5 Science	\$1,000,000.00
6-8 Science	\$500,000.00
<b>V. Adaptive Technology:</b>	
Reading & Mathematics	\$2,150,154.00
<b>New Implementation Total</b>	<b>\$9,596,518.00</b>

Program Maintenance	
Library Media*	\$800,000.00
Charter Schools*	\$2,100,000.00
K-5 Literacy Teacher Materials <i>(writing &amp; phonics kits, classroom libraries)</i>	\$150,000.00
Dual Enrollment*	\$725,000.00
ESE K-12 New Adoptions	\$300,000.00
ELL K-12 New Adoptions	\$300,000.00
FY16 losses/replacement costs, K-12	\$275,000.00
Freight costs*	\$175,000.00
Rebinding of texts	\$15,000.00
Science Consumables, K-5	\$150,000.00
Science Consumables, 6-12	\$200,000.00
Course Changes <i>(science, social studies, math, ELA, African, Latino, Holocaust studies)</i>	\$300,000.00
AP State Supported Courses	\$150,000.00
Destiny Software Subscription	\$55,000.00
<b>Program Maintenance Total</b>	<b>\$5,695,000.00</b>
<b>IM Budget Total</b>	<b>\$15,291,518.00</b>
State Revenue (Categorical)	\$14,716,518.00
FY16 Carry-Over Estimated	\$400,000.00
Collection from Lost/Damages	\$175,000.00
<b>Revenue Total</b>	<b>\$15,291,518.00</b>

\* Non Negotiable

<b>\$0.00</b>
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Last Updated 1/29/16



### Agenda Item Details

Meeting	May 11, 2016 - 1. REGULAR BOARD MEETING at 5 p.m. in the Board Room
Category	17. New Business
Subject	FMPA10 Purchase of iReady Diagnostic and Instruction for Reading and Mathematics Grades K-5
Type	Action
Recommended Action	I recommend the Board approve the purchase of iReady Diagnostic and Instruction for Reading and Mathematics with Curriculum Associates in the amount of \$5,601,822 for a school years 2016 through 2019; and authorize the Superintendent and Board Chairman to finalize and sign all necessary documents.

#### DESCRIPTION:

Agreement with Curriculum Associates, a Bid Exempt Vendor, for the purchase of *i-Ready* Diagnostic & Instruction for Reading and Math grades K-5 for the 2016-2017, 2017-2018, and 2018-2019 school years. *i-Ready* Diagnostic and Instruction for reading and mathematics combines web-based diagnostic, growth monitoring, standards mastery, and progress monitoring assessments with instructional resources personalized to each student's specific academic needs.

Prior year purchases from this vendor were made by individual schools and departments in support of the new standards. Centralizing the purchase of these site licenses and teacher tool kits has resulted in a 20 percent software volume discount and software multi-year discount with payment plan.

Built to address the rigor of the new standards, *i-Ready* helps students make real gains. *i-Ready* collects a broad spectrum of rich data on student abilities that identifies areas where a student is struggling, measures growth across a student's career, supports teacher-led differentiated instruction, and provides a personalized instructional path within a single online solution.

#### CONTACT:

Michael J. Burke, Chief Financial Officer ([mike.burke@palmbeachschools.org](mailto:mike.burke@palmbeachschools.org))  
 David Christiansen, Ed.D., Deputy Superintendent/Chief of Schools ([david.christiansen@palmbeachschools.org](mailto:david.christiansen@palmbeachschools.org))  
 Keith Oswald, Chief Academic Officer ([keith.oswald@palmbeachschools.org](mailto:keith.oswald@palmbeachschools.org))  
 Karen Whetsell, Assistant Superintendent, Division of Teaching and Learning ([Karen.whetsell@palmbeachschools.org](mailto:Karen.whetsell@palmbeachschools.org))

#### FINANCIAL IMPACT:

The financial impact to the District's General Fund budget is not to exceed \$5,601,822. The source of funds is Instructional Materials and Digital Classroom Allocation Categorical Appropriation.


#### SCHOOL BOARD GOALS: (Check all that apply.)


- 1. Student First Philosophy
- 2. Family Matters
- 3. Qualified and Highly Effective Workforce
- 4. Efficiency and Accountability
- 5. Community Engagement
- 6. Communication


- Beneficial Interest - Curriculum Associates, LLC 12.10.14.pdf (394 KB)
- Bid Exempt Form - Curriculum Associates, LLC 8.19.15.pdf (376 KB)
- i-Ready Proposal for Palm Beach County\_April 2016.pdf (4,917 KB)




 FMPA10 i-Ready Proposal for Palm Beach County\_April 2016.pdf (4,917 KB)

 FMPA10 i-Ready Form 2220.pdf (1,027 KB)

 FMPA10 Curriculum Associates Legal Checklist and Agreement.pdf (3,511 KB)

 Q&A FMPA10.1.pdf (1,211 KB)

 Q&A FMPA10.2.pdf (8 KB)

### **Motion & Voting**

I recommend the Board approve the purchase of iReady Diagnostic and Instruction for Reading and Mathematics with Curriculum Associates in the amount of \$5,601,822 for a school years 2016 through 2019; and authorize the Superintendent and Board Chairman to finalize and sign all necessary documents.

Motion by Debra Robinson, second by Karen Brill.

Final Resolution: Motion Passes

Yea: Marcia Andrews, Frank Barbieri, Karen Brill, Debra Robinson, Chuck Shaw, Erica Whitfield