

## MEMORANDUM

TO: JORIS JABOUIN, CHIEF AUDITOR  
JENNIFER HARPALANI, MANAGER, INFORMATION AND TECHNOLOGY AUDITS

FROM: AMY SMITH, MANAGER, PUBLIC CONSULTING GROUP

SUBJECT: CASE MANAGEMENT SOFTWARE AUDIT

DATE: FEBRUARY 24, 2023

CC: ERNIE LOZANO, DR. NICOLE MANCINI, DR. JOSIAH PHILLIPS, MARY COKER, MICHELLE WILCOX, AND KATHELYN JACQUES-ADAMS

*via electronic delivery*

---

### Summary

Representatives from Broward County Public Schools met with Public Consulting Group (PCG) on Monday, February 13, 2023, to discuss the audit committee recommendation that would be presented to the School Board of Broward County (SBBC) on February 15, 2023. Joris Jabouin, the lead auditor, apprised PCG of the findings from the Carr, Riggs & Ingram (CRI) Forensic Examination FY22-001 – Education Case Management Software, Public Consulting Group (PCG). During the call, Mr. Jabouin explained the process for CRI's forensic examination and shared the results. In part, Mr. Jabouin stated that CRI was unable to find sufficient evidence to support PCG's explanation that a scrivener's error existed in our prior contract as it related to EDPlan Document Translation services (but that there was such support for such an error with respect to Paperclip document storage services for Behavioral Threat Assessment).

The conference on February 13 was PCG's first opportunity to speak directly with anyone at SBBC about the forensic review. Nevertheless, PCG greatly appreciated the opportunity to hear from Mr. Jabouin and prepared this memorandum in response to that conversation to provide further perspective for the SBBC and to reaffirm our position that SBBC staff intended to pay for EDPlan Document Translation services. (Please also refer to PCG's memo of October 19, 2022, on this topic that was exchanged between legal counsel for further support and explanation.)

PCG's position with respect to this matter has been and remains the same. Specifically, that the contract language in question was mutually developed by SBBC and PCG over the course of many months and countless teleconferences. PCG has acknowledged that the contract language concerning pricing for dynamic Document Translation services could have been clearer. Yet PCG maintains that SBBC representatives who negotiated the contract fully understood and agreed that PCG's translation services had evolved from a predecessor contract to include dynamic Document Translation – a new, standalone feature that would enhance SBBC's translation capabilities – therefore should be represented in the contract as a separate deliverable and budget line item. That is the reason why, for example as explained below, (i) an SBBC

representative inquired about reducing Document Translation's standalone price during the course of contract negotiations and (ii) the total requested budget amount under the contract, of approximately \$8.289 million over three years, which was approved by district staff and the SBBC, was calculated by adding Document Translation services as a separate budgetary amount. And, in turn, after reviewing and approving the draft invoices presented that again showed Document Translation services as a separate cost item, the district knowingly paid for services rendered. Accordingly, PCG has not been overpaid for Document Translation services.

### **Response to CRI Findings**

After the February 13 meeting, PCG conducted an exhaustive search of our records to further substantiate that SBBC agreed to pay for dynamic Document Translation services and that no overpayment occurred. For ease of review, PCG has summarized its findings into three categories of documentation:

- (1) Contract Negotiation
- (2) Verification of Contract Approval of Total Value, Inclusive of dynamic Document Translation Costs
- (3) Verification of Invoice Schedule and Payment of dynamic Document Translation services

Directly following this memo, PCG presents a series of Exhibits offering supporting documentation in each of the three categories. Through these documents, PCG provides ample evidence of the mutual intention by PCG to price and SBBC to pay for dynamic Document Translation services as a separate amount beginning in the 2021 Agreement, hence the additional line item of clarification in the contract.

Specifically, the Exhibits provided include the following types of documentation:

- **Category 1. Contract Negotiation (Pre-Contract Award)** - In early 2021, PCG and SBBC staff participated in three separate meetings where Document Translation scope and price were discussed. PCG has documentation from those meetings, including meeting agendas, documents discussed, documentation of PCG internal preparation, and email exchanges between PCG and SBBC representatives.
- **Category 2. Verification of Contract Approval of Total Value** - The total contract value of the SBBC approved PCG contract of \$8,289,939 included dynamic Document Translation costs as a separate and independent amount. The fee table in the contract that demonstrates the math has been included.
- **Category 3. Verification of Invoice Schedule and Payment (Post-Contract Award)** - Email dialogue between PCG and SBBC staff, shortly after contract approval, explicitly authorizing PCG to invoice Document Translation services as a separate and independent amount for \$75,000 in FY22.

In addition to these three categories of documentation, PCG can prepare a file that contains additional documentation to support the timeline of events and PCG's claim that SBBC knew that dynamic Document Translation was a separate service and fully intended to pay separately for such services. PCG encourages the review of all materials included with this communication as a first step and is committed to continuing to work with SBBC to fully resolve this matter.

## Relevant Context Regarding the Shift to Dynamic Translation

By way of background, EDPlan offers two Document Translation options: Static and Dynamic.

- “Static” translation refers to an option that allows only certain phrases in portions of IEP-related documents to be translated. This was the traditional approach used by SBBC prior to the 2021 Agreement. The district paid translators to provide more comprehensive translation support and to provide targeted translations for specific phrases within the system. This was provided by PCG in EDPlan at no additional cost, after the initial setup charges.
- “Dynamic” translation refers to an option that allows for more powerful translation capabilities. As described in the 2021 Agreement, PCG offered a newly developed “Dynamic” Document Translation feature, leveraging the power of Google’s Translation API (Application Programming Interface). As a result of its implementation, Broward can instantly translate documents in multiple languages, including all text within the document—this includes free text entered by users and present level of performance goals. This new feature was offered to PCG clients including SBBC for an additional annual cost and greatly reduces the need for SBBC to hire external translators.

In the case of dynamic translation, when documents are finalized, the dynamic Document Translation feature retains both the translated and English versions within the student’s historical record. The price of the dynamic Document Translation feature thus includes: (a) the cost to set up and develop the dynamic translations feature, (b) the cost to run/maintain the feature in various languages and provide the ongoing full translation service, and (c) the cost to store translated documents. The setup and ongoing costs for the dynamic option are significantly more than the static translation costs. This is why these costs are in addition to the base price of the Exceptional Student Service (ESS) Subscription, which ESS price has largely remained the same with nominal increases from predecessor contracts through the 2021 Agreement. The new “Dynamic” translation option is referred to within the 2021 Agreement as Document Language Translation.

## Three Categories of Evidence and Documentation

### Category 1: Contract Negotiation

In February 2021, PCG held the initial discussions with SBBC representatives to begin ESS contract renewal discussions related to the 2021 Amendment. PCG representative Chantal Stepney prepared a summary of the PCG proposal (Exhibit 1.1 - presented as a draft document and shared on screen during meetings) to guide the ESS services price discussion. The discussion regarding contract terms and pricing transpired in a series of meetings and discussions from mid-February to April, when the terms were finalized.

The portion of the discussions related to dynamic Document Translation focused heavily on the cost of the feature. SBBC representative Tara Rodger dedicated a considerable amount of time to evaluating the cost difference of the static approach versus the dynamic translation process. She wanted to ensure that the new process would streamline the work effort for EDPlan end users, reduce Broward’s costs to hire outside translators, and expand the ability to translate more key documents into more languages.

The order of events that occurred are as follows (all dates are 2021):

- **February 16, 2021** - Tara Rodger and Teresa Hall participated in the initial contract renewal conversation with PCG. They asked a series of standard questions about the renewal and discussed new services to consider. One of the follow-up actions required PCG staff to review pricing options regarding dynamic Document Translation services.
- **February 16 – 24** - Per Exhibit 1.2, following the February 16 meeting, Clif Daniel, from the PCG Project Management Office (PMO), set up an internal meeting to address SBBC questions about the pricing of dynamic Document Translation. Exhibit 1.2 references several internal PCG conversations.
- **February 17** – Chantal Stepney shared a draft proposal, (Exhibit 1.1), for ESS services, inclusive of dynamic Document Translation as a separate cost.
- **March 1** - Tara Rodger and Kim Punzi-Elabary, SBBC representatives, met with Chantal Stepney, Amy Smith, and three other PCG representatives to discuss scope and price for the ESS work. Questions and answers from the February 16 meeting were also discussed. On the call, PCG reviewed and displayed the proposal (Exhibit 1.1), inclusive of the new dynamic Document Translation approach/cost. PCG and SBBC did not finish the conversation and agreed to reconvene on March 5.
- **March 5** – This meeting agenda included an item for dynamic Document Translation scope and price. Exhibit 1.3 shows the meeting invite, agenda, and document attachment. Meeting participants reviewed the documents that needed to be prioritized for translation, as Tara Rodger specifically wanted to contain the scope and price of dynamic Document Translation. The Excel spreadsheet in Exhibit 1.3a shows that, of the documents in EDPlan, some were “currently translated” using the Static Translation feature, indicating a clear distinction between the two translation services.
- **April 1** - Per Exhibit 1.4, Tara Rodger emailed PCG to ask about options for reducing dynamic Document Translation scope, thereby reducing the total cost of Document Translation features, confirming her understanding that there was a separate cost for Dynamic Translation. Throughout the contract renewal process, PCG worked to address Tara Rodger’s questions about the change in price of the Document Translation feature to ensure it was the right approach for SBBC to consider.

Price was finalized by reducing scope shortly after the April 1 email from Tara Rodger. An initial discount was offered for Dynamic Translation Services in Year One at \$75,000 in FY22 and \$300,000 annually thereafter. These are the amounts included in the contract pricing table.

### Category 2 – Verification of Contract Approval of Total Value

District and School Board representatives understood and approved the full cost of the contract.

- **May 18** - Exhibit 2.1 demonstrates a total of \$8,289,938, which includes the newly purchased Document Translation feature as a separately added amount.
- **May 18** - Exhibit 2.2 shows the table that accounts for all line items in the spending authority date in the pricing table associated with Exhibit 2.1; this set of line items totals the amount Broward signed off on as the total contract value.

It is important to note that SBBC authorized spend authority in phases as funding sources were secured; if SBBC had committed an error authorizing a given expense, they could have amended the agreement and fixed the error in a subsequent event.

Moreover, it is important to note that despite CRI's assertion and the audit committee's recommendation, SBBC on the recommendation of district staff reaffirmed the nature of Document Translation services being a separate and independent budget item in the new contract agreement that was recently approved by the SBBC on December 20, 2022. This new contract which will run for the rest of what would have been the 2021 Agreement's term, now clearly expresses and details separate payment for the Document Translation feature, thereby preserving the intent and understanding of PCG and SBBC while also fixing the prior scrivener's error.

### Category 3 – Verification of Invoice Schedule and Payment

The invoice payment of \$75,000 made to PCG for Document Translation services was not the result of an error or overcharge. Instead, this discounted initial payment addressed the fees associated with PCG's phased implementation to enable 48 Broward documents for the new dynamic Document Translation feature and Broward's use of this new feature to translate approximately 60,000 documents.

In addition, PCG took the following steps to ensure that invoices reflected the correct amounts:

1. PCG built an invoicing schedule to show every line item, the date/frequency of when invoices would be generated, and every payment that Broward funding sources would process. Dan Gohl, former Broward Chief Academic Officer, specifically asked for the invoice schedule so every funding source could be approved before signing the contract.
2. PCG obtained post-contract award approval of the invoicing schedule via Tara Rodger ensuring that the invoice schedule was correct (PCG posted the approved invoice schedule on the Broward-facing SharePoint for shared access).
3. PCG gained confirmation from Broward on the invoice amounts and submission plan prior to preparing invoices.
4. PCG finally sent invoices to Broward Accounts Payable with Broward representatives copied for official Broward approval and payment.

All invoices were approved and paid by Broward representatives without dispute.

- **July 22** - Exhibit 3.1 shows the joint SharePoint site accessed by both SBBC and PCG, and specifically shows that Tara Rodger first accessed the file on July 22, 2021. In the posted invoice schedule, the Document Language Translation feature is listed to match the contract as a separate \$75,000 line item in FY22.
- **Nov 1** - Per Exhibit 3.2, meetings occurred in early November 2021 between Tara Rodger and the PCG Team to align on final invoice schedule; the follow-up indicates no dispute or question regarding the separately priced enhanced Document Language Translation feature. In fact, Tara Rodger replied on the same business day, confirming she would align the SBBC team.
- **Nov 8** - Exhibit 3.3 presents a communication from Tara Rodger on November 8, 2021, to follow-up on action items set on November 1, 2021; this communication includes

language requesting that PCG “please send quarterly for the IEP Part”, explicitly demonstrating that the ESS Subscription was only a “part” of what SBBC would be invoiced for, and to send invoices quarterly, as opposed to the single-invoice approach that was agreed to for the Document Language Translation feature.

## **Conclusion**

PCG appreciates the opportunity to submit this information to substantiate its firm position that Broward has neither been overbilled nor has Broward overpaid for the Document Language Translation feature, despite the scrivener’s error in the contract. Rather, Broward representatives willingly and methodically negotiated for and approved the correct fees and invoices for the Document Translation feature. PCG wishes for expedient resolution to this misinterpretation. Please feel free to reach out to Amy Smith, [amysmith@pcgus.com](mailto:amysmith@pcgus.com) at any time for additional information and documentation.

END OF MEMORANDUM

## EXHIBIT COVERSHEET

Exhibit Number	Title of Document	Page Number
Category 1: Contract Negotiation (Pre-Contract Award)		
1.1	PCG-Drafted Proposal Shared on Call with SBBC Representative	10-12
1.2	Internal Meetings and Correspondence to Discuss Dynamic Document Translation Scope and Pricing	14-15
1.3	Meeting Invite and Agenda for PCG/SBBC Meeting to Discuss Dynamic Document Translation	17
1.3a	Document Attachment for PCG/SBBC Meeting to Discuss Dynamic Document Translation	19
1.4	Email from Tara Rodger Asking About Options to Reduce Dynamic Document Translation Scope	21
Category 2: Verification of Contract Approval Total Value		
2.1	School Board Representatives Understood and Approved the Full Cost of the Contract	24
2.2	Spend Authority Table Accounts for All Line Items Approved and the Start Date they were Approved	26-31
Category 3: Verification of Invoice Schedule and Payment (Post-Contract)		
3.1	Invoicing Schedule Accessed by SBBC lists Document Language Translation as Separate Line Item	34
3.2	Approval of Invoice Schedule with No Dispute	36-38
3.3	Email from Tara Rodger Demonstrating ESS Subscription is Only "Part" of Invoice (Other "Part" is Translation)	40

Please note that certain sections of this response have been redacted as they were deemed irrelevant to the forensic findings.

# CATEGORY 1

Exhibit Number	Title of Document
<b>Category 1: Contract Negotiation (Pre-Contract Award)</b>	
1.1	PCG-Drafted Proposal Shared on Call with SBBC Representative
1.2	Internal Meetings and Correspondence to Discuss Dynamic Document Translation Scope and Pricing
1.3	Meeting Invite and Agenda for PCG/SBBC Meeting to Discuss Dynamic Document Translation
1.3a	Document Attachment for PCG/SBBC Meeting to Discuss Dynamic Document Translation
1.4	Email from Tara Rodger Asking About Options to Reduce Dynamic Document Translation Scope



# EXHIBIT 1.1

PCG-DRAFTED PROPOSAL SHARED ON CALL WITH SBBC REPRESENTATIVE

February 17, 2021

DRAFT: PCG-BCPS ESE Core &amp; Supplemental Case Management System Pricing

### Introduction

Public Consulting Group, Inc. (PCG) is pleased to submit this pricing summary for Exceptional Students Education (ESE) and Supplemental Case Management System services for Broward County Public Schools' (BCPS') for review and consideration in the contract development process.

Our summary represents our best effort to balance adding value where it matters most to you while remaining as cost effective as possible. We believe this is reflected in the following ways:

- **Thorough process updates and User Interface (UI) redesign** for the core ESE related case management services to improve end user satisfaction, address existing back logged enhancement requests, and modernize the look and feel of the system.
- **Technology optimization and increased efficiencies** with the addition of five (5) new services that exist on a single, integrated platform (EDPlan)
- **Improved documentation management** with increased storage via the continued use of PaperClip to alleviate the ESE team's pain points and concern regarding overages
- **Enhanced user support** with the addition of a designated Client Services Associate to serve as the primary point of contact and functional area project manager to the ESE team

Each of these value additions, and more represent a potential cost savings to the district of over **\$1.4 million** during the new service term. We hope you will find that our services directly promote the district's core values (Student Focus, Teaching Excellence, Accountability, Respect, and Safety), and represents an opportunity to deepen our partnership and build on over 20 years of service to BCPS.

### FY22 Build New Enhanced Solution while Maintaining Legacy EDPlan System for the ESE Program



Our teams have worked diligently throughout this contract review process to document, review and obtain sign-off for the process enhancements most important to the BCPS team. We anticipate that contract finalization will occur during Spring 2021, allowing PCG to prepare for and begin development during Summer 2021, and complete rollout of your new system by Spring 2022.

February 17, 2021

DRAFT: PCG-BCPS ESE Core &amp; Supplemental Case Management System Pricing

PCG will maintain your current legacy system as we develop the new one to ensure continuity of services. The pricing below reflects our efforts to apply the minimal fees associated with developing and implementing the new system, maintaining the legacy solution during this time, and supporting the new system once it is rolled out and the legacy solution has sunset.

FY22 ESE Legacy System Maintenance & Support Services	FY22 – Build New EDPlan Process	FY22 ESE New System Maintenance & Support Services
<p><b>A. Prorated Services: \$</b></p> <ul style="list-style-type: none"> <li>Prorate the annual fees for maintaining the legacy system until the new system is sunset:               <ul style="list-style-type: none"> <li>Individualized Education Programs</li> <li>Gifted Plan</li> <li>Service Plans for Private Schools</li> <li>EDPlan Connect</li> <li>Advanced Reporting</li> <li>PaperClip</li> <li>Static Document Language Translation</li> <li>Monthly Meetings</li> <li>User Support</li> <li>See 1 bug fixes, but no system enhancements unless state mandated and required immediately with no viable alternatives otherwise</li> </ul> </li> </ul> <p><b>B. Discontinued Services</b></p> <ul style="list-style-type: none"> <li>Per BCPS' request. PCG will discontinue the services below.               <ul style="list-style-type: none"> <li>EasyFax</li> <li>SmartScan</li> </ul> </li> </ul>	<p><b>A. Cost of EDPlan Process Enhancements \$</b></p> <ul style="list-style-type: none"> <li>PCG estimates 6,800 hours of time to implement the new Florida state system, including BCPS customizations</li> <li>As a valued partner, PCG is willing to share the costs with BCPS to update the ESE solution. Services included:               <ul style="list-style-type: none"> <li>Business process redesign sessions</li> <li>Business requirements and design documents</li> <li>Development and Testing</li> <li>Rollout Planning &amp; Coordination</li> </ul> </li> </ul>	<p><b>A. Prorated Services: \$</b></p> <ul style="list-style-type: none"> <li>When the new system is released to production and the legacy system sunsets, annual fees will begin on a prorated basis, for the remainder of FY22 school year:               <ul style="list-style-type: none"> <li>Individualized Education Program</li> <li>Gifted Plan</li> <li>Service Plans for Private Schools</li> <li>EDPlan Connect</li> <li>Advanced Reporting</li> <li>PaperClip</li> <li>Monthly Meetings</li> <li>User Support</li> </ul> </li> </ul> <div data-bbox="1360 943 1835 1219" style="border: 2px solid red; padding: 5px;"> <p><b>B. FY22 EDPlan Prorated Dynamic Translation Services: \$75,000</b></p> <ul style="list-style-type: none"> <li>PCG will replace the current static document translation with dynamic translation services.               <ul style="list-style-type: none"> <li>Includes dynamic (Google) Translation for up to eight (8) languages (including Arabic)</li> </ul> </li> </ul> </div>

February 17, 2021

DRAFT: PCG-BCPS ESE Core &amp; Supplemental Case Management System Pricing

**Ongoing Case Management Services for the Exceptional Students Education (ESE) Program****A. FY23 and Subsequent Years:**

- All ESE related functionality and services included in the updated EDPlan system will be available to BCPS after Year One. Associated annual fees include:
  - Functionality Licensing and Access
  - Maintenance and Support for Customizations completed during the term of the Agreement
  - Standard User Support

**B. FY22 EDPlan Prorated Dynamic Translation Services: \$300,000/year**

- Includes dynamic Translation for up to eight (8) languages (including Arabic)

**Supplemental EDPlan Services****A. Bundle Pricing (Limited Time Offer)**

- PCG will waive the Updated EDPlan System & Process Enhancements should BCPS agree to implement at least four of the five supplemental services listed below

Supplemental Service	BCPS Implementation Fee Per Service	BCPS Annual Fee
504		
Progress Track		
EasyTrac		
Behavioral and Mental Health		
Electronic Health Record		

**Bank of Development Hours****A. 125 hours/year (\$ )**

- This service includes a flexible bank of hours to meet BCPS' project needs
- Hours will be applied to ESE related projects only
- PCG will reasonably apply hours towards all work required to complete the customization: from planning, to full rollout and training (if applicable)
- Should BCPS exhaust the bank of hours prior to the end of this new Agreement, the district may purchase additional customizations or work at a rate of \$

# EXHIBIT 1.2

INTERNAL MEETINGS AND CORRESPONDENCE TO DISCUSS DYNAMIC DOCUMENT  
TRANSLATION SCOPE AND PRICING



**From:** Stepney, Chantal  
**Sent:** Tuesday, February 16, 2021 11:48 AM  
**To:** Daniel, Clif <cddaniel@pcgus.com>; Smith, Amy <amysmith@pcgus.com>  
**Subject:** RE: Broward Pricing

Hi Clif. Yes, I've been working on it. Please see the link below. I am in the process of adding the details for the supplemental services, but all Exceptional Students Education (ESE) case management services and the EDPlan Bank of Hours have already been accounted for in this document.

<https://teams.microsoft.com/l/file/>



Amy is going to review this document and advise edits/updates as needed. If there are other teams that will need to discuss significant pricing changes to their functional areas, I recommend that they use the document as a template for their services.

Also Clif, regarding freebies, the PCG ESE team doesn't have any to share. I think you meant Sophia when you'd mentioned info you received regarding freebies PCG has allowed in FY21.

-Chantal

-----Original Appointment-----

**From:** Daniel, Clif  
**Sent:** Friday, February 19, 2021 5:00 PM  
**To:** Daniel, Clif; Smith, Amy; Stepney, Chantal; Hayes, Heather  
**Subject:** Broward Translation Services  
**When:** Wednesday, February 24, 2021 4:00 PM-4:30 PM (UTC-06:00) Central Time (US & Canada).  
**Where:** Microsoft Teams Meeting

Agenda

- Determine responses to Tara's comments about Translation Services and pricing

**From:** Hayes, Heather <HHayes@pcgus.com>  
**Sent:** Wednesday, February 24, 2021 11:18 AM  
**To:** Stepney, Chantal <cstepney@pcgus.com>; Daniel, Clif <cddaniel@pcgus.com>; Smith, Amy <amysmith@pcgus.com>  
**Subject:** RE: Broward Translation Services

Hi all,

Here are some thoughts that I think I heard on our last call:

1. Reduce the number of languages being translated overall (original request was for 8, can we decrease that number?)
2. Scale back which documents need to utilize translation (review all documents in the system and note which ones MUST be translated for parents)
3. Look at a phased implementation – can we start with 5 documents being translated in Year 1, then add another 5 in Year 2, etc. (the number 5 is just an example, this can be paired with item 2 above)

Were there any other suggestions that I am missing?

**From:** Daniel, Clif <cddaniel@pcgus.com>  
**Sent:** Wednesday, February 24, 2021 3:57 PM  
**To:** Smith, Amy <amysmith@pcgus.com>; Stepney, Chantal <cstepney@pcgus.com>  
**Subject:** RE: Broward Exceptional Student Services Pricing

Here's what we talked about on the call today.

**Agenda**

- Creative alternatives to the pricing – work with Tara to reschedule the meeting for Monday; prepare internally to identify the trading cards we'd like to negotiate with; the goal for the next meeting with Tara is for Broward to identify what services they will seek spending authority for and which ones they won't get authority for.
- Translation – Wording is ready to send to Tara about what scope to adjust to lower translation costs.
- EDPlan enhancement where are we in the schedule? How to communicate the timeline of the project. Clif to meet with Arathi/Heather/Larissa/Amy to identify gaps preventing us communicating what the time line is. Clif to get confirmation of estimated costs and timing from Arathi/Heather for use in pricing negotiations.

# EXHIBIT 1.3

MEETING INVITE AND AGENDA FOR PCG/SBBC MEETING TO DISCUSS DYNAMIC  
DOCUMENT TRANSLATION



**Subject:** Follow Up: EDPlan Enhancements Pricing Discussion  
**Location:** Microsoft Teams Meeting

**Start:** Fri 3/5/2021 1:00 PM  
**End:** Fri 3/5/2021 2:00 PM

**Recurrence:** (none)

**Meeting Status:** Accepted

**Organizer:** Stepney, Chantal  
**Required Attendees:** Tara A. Rodger; Kim M. Punzi-Elabiary; Smith, Amy

Follow up to discuss options for the spending authority and possible areas for adjustments.

A few thoughts:

**Development Bank of Hours**

Broward's ask from our last discussion was 125 hours/year at \$.

Could we review adding development hours to account for some of the work being done for the EDPlan ESE enhancements?

**Translation Services**

Spreadsheet forthcoming to serve as a potential guide to use to adjust Translation services scope

**Supplemental Services**

Electronic Health Record module: Debrief the Electronic Health module meeting to determine likelihood of this service being purchased

Progress Track and 504: What would be the likelihood of the ESE team purchasing these services? What year would the ESE team consider implementing them?

**Open Discussion**

Have we identified other alternatives we want to discuss?

## Microsoft Teams meeting

**Join on your computer or mobile app**

[Click here to join the meeting](#)

# EXHIBIT 1.3a

DOCUMENT ATTACHMENT FOR PCG/SBBC MEETING TO DISCUSS DYNAMIC  
DOCUMENT TRANSLATION

	A	B	C	D	E
1	Broward County Public Schools				
2	ESE Team Translation Services				
3	Documents Review				
4					
5	Document Name	Currently Translated	Does this need to be translated in the enhanced platfo	All Languages Needed for School Year 2021	All Languages Needed for School Year 2022
6	10a District Response to Complaint	Yes			
7	10b District Response Parent Letter	Yes			
8	17 Parent Records Request Letter				
9	18 Index of Exhibits				
10	19 Witness List for Hearing				
11	1b State Mediation Parent Receipt Letter	Yes			
12	1c Local Conflict Resolution Parent Receipt Letter	Yes			
13	2 Student Profile Sheet				
14	20 Notice of Witness Meeting				
15	26 Resolution Session Staff Notice				
16	27 Resolution Session Parent Notice				
17	29 Resolution Agreement				
18	2b DOE Resolution Report				
19	3 Due Process Request DOAH	Yes			
20	30 Due Process Withdraw Request				
21	31 Due Process Withdraw Parent Letter				
22	34 State Mediation Staff Notice				
23	3a DP District Request DOAH				
24	4ab DP Parent Receipt Letter	Yes			
25	4c DP Parent Receipt Letter Dist Filed	Yes			
26	4d Parent Receipt Letter Dist Filed	Yes			
27	5 DP Principal Notification Parent				
28	5a DP Principal Notification District				
29	6a DP ESE Spec Notification Parent				
30	6aa DP ESE Spec Notification District				
31	6b Potential Witness List				
32	A1 IEE Request Receipt	Yes			
33	Abbreviated Student Rating Form				
34	Authorization of Release of Information	Yes			
35	B1 IEE Approval Letter	Yes			
36	B2 IEE Letter To Evaluator	Yes			
37	B3 IEE Evaluator Confirmed To Parent	Yes			
38	B4 IEE District Evaluator Confirmed to Parent	Yes			
39	Behavior Log Graphs				
40	Behavior Profile at a Glance				
41	Behavioral Threat Assessment				
42	BTA Witness Interview				
43	C1 IEE Denial Letter	Yes			
44	C2 IEE Denial Pending	Yes			
45	C3 IEE Denial DOAH				

Note: Due to the volume of content, a snapshot is included. The full file can be provided upon request.

# EXHIBIT 1.4

EMAIL FROM TARA RODGER ASKING ABOUT OPTIONS TO REDUCE DYNAMIC  
DOCUMENT TRANSLATION SCOPE

**From:** Tara A. Rodger <tara.rodger@browardschools.com>  
**Sent:** Thursday, April 1, 2021 4:44:08 PM  
**To:** Daniel, Clif <cddaniel@pcgus.com>; Stepney, Chantal <cstepney@pcgus.com>  
**Subject:** Translations

**[EXTERNAL EMAIL]** Be cautious when clicking links or opening attachments.

What would the cost be if I stuck with the 3 languages we currently translate into?

Tara Rodger  
EMS Manager  
ESLS Support Services  
754-321-3400

**END OF CATEGORY 1 EXHIBITS**

# CATEGORY 2

Exhibit Number	Title of Document
Category 2: Verification of Contract Approval Total Value	
2.1	School Board Representatives Understood and Approved the Full Cost of the Contract
2.2	Spend Authority Table Accounts for All Line Items Approved and the Start Date they were Approved

# **EXHIBIT 2.1**

**SCHOOL BOARD REPRESENTATIVES UNDERSTOOD AND APPROVED THE FULL COST OF  
THE CONTRACT**

 <b>THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA</b>		Status: ORIGINAL
	2021-05-18 Regular School Board Meeting CATEGORY: CO, Strategy & Operations DEPARTMENT: Procurement & Warehousing Services	Agenda Item Number: 00-46 Content or Open Item: Open Special Order: NO Time for Special Order:

  

<b>TITLE:</b>  <b>REQUESTED ACTION:</b>	<b>FY22-001 - Education Case Management Software (EasyEP)</b>  Approve the recommendation to award the above-referenced Agreement; Contract Term: July 1, 2021 through June 30, 2024; Award Amount: <b>\$8,289,938</b> ; Awarded Vendor(s): Public Consulting Group LLC; User Department: Office of Academics; Student Support Initiatives & Recovery; School Performance & Accountability.
---	---

  

<b>STRATEGIC ALIGNMENT</b>									
Which strategic initiative(s) best aligns to this item?									
<u>Achievement &amp; Equity</u>	<u>Personalized Pathways</u>								
Is approval of this agenda item required to implement a tactic included within an initiative of the strategic plan? <b>YES</b>									
Will the implementation of this item have a direct impact on one of the 2024 Strategic Plan Primary Metrics? <b>YES</b>									
If YES, identify the primary metric and include the corresponding figures in the table below. <div style="text-align: center; margin-top: 10px;"> <b>Primary Goal &amp; Metric:</b> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <tr> <td style="width: 33%;"><u>High-Quality Instruction</u></td> <td style="width: 33%;"><u>School Academic Performance</u></td> </tr> <tr> <td style="width: 25%;">Level</td> <td style="width: 25%;">Baseline</td> </tr> <tr> <td style="width: 25%;">2024 Target</td> <td style="width: 25%;">Most Current</td> </tr> <tr> <td>District Total</td> <td></td> </tr> </table>		<u>High-Quality Instruction</u>	<u>School Academic Performance</u>	Level	Baseline	2024 Target	Most Current	District Total	
<u>High-Quality Instruction</u>	<u>School Academic Performance</u>								
Level	Baseline								
2024 Target	Most Current								
District Total									
If NO, outline below how staff intends to evaluate the success/impact of this item/initiative. <div style="border: 1px solid black; height: 100px; width: 100%; margin-top: 10px;"></div>									
Also identify any secondary metrics utilized to evaluate the success of this item/initiative. <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="width: 33%;">Metric</td> <td style="width: 33%;">Baseline</td> <td style="width: 33%;">Target</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table>		Metric	Baseline	Target					
Metric	Baseline	Target							

  

<b>BACKGROUND, SUMMARY EXPLANATION, AND HISTORY OF ITEM</b> Was this item previously presented to the School Board? <b>YES</b>  This Agreement will provide the SBBC with an integrated contract that will assist the District in delivering the required articulated services to the District exceptional student learners, students Individual Education Plan for Student with Disabilities and Innovative Learning. This Agreement also include a portfolio of services, content and experiences to support and the District's staff for a safe and engaging instruction.  This Agreement has been reviewed and approved as to form and legal content by the Office of the General Counsel.	<b>RELATED ITEMS</b> EE-21 - 12/10/19 EE-1 - 02/20/19 EE-1 - 10/16/18  <b>EXHIBITS</b> Exocative Summary Agreement        
---	---



# EXHIBIT 2.2

SPEND AUTHORITY TABLE ACCOUNTS FOR ALL LINE ITEMS APPROVED AND THE START  
DATE THEY WERE APPROVED

Invoicing Line Item	Units/ Year	Fee	3 Year Contract Amount	Invoicing Frequency	Start of Spending Authority
<b>1. Case Management</b>					
<b>1.1. Exceptional Student Services</b>					
Exceptional Student Services Subscription (1.1.1 through 1.1.7)		FY22 = \$766,722 FY23 & 24/Year = \$793,638	\$2,353,998		July 1, 2021
Document Language Translation (1.1.6 Document Language Translation)		FY22 = \$75,000 FY23 & 24/Year = \$300,000	\$675,000		July 1, 2021
504 Module Subscription (1.1.9 504 Module)					
504 Module Installation (1.1.9 504 Module)					
Progress Track Subscription (1.1.10 Progress Track for EasyIEP)					
Progress Track Installation (1.1.10 Progress Track for EasyIEP)					
EasyTrac Medicaid Billing (1.1.11 EasyTrac Medicaid Billing)					
EasyTrac Medicaid Billing Installation (1.1.11 EasyTrac Medicaid Billing)					
Behavioral & Mental Health Subscription (1.1.12 Behavioral & Mental Health Module)					

Invoicing Line Item	Units/ Year	Fee	3 Year Contract Amount	Invoicing Frequency	Start of Spending Authority
Behavioral & Mental Health Installation (1.1.12 Behavioral & Mental Health Module)					
Electronic Health Record Module Subscription (1.1.13 Electronic Health Record Module)					
Electronic Health Record Module Installation (1.1.13 Electronic Health Record Module)					
Bank of Hours (scope items 1.1.1 through 1.1.6)	125	\$210/Hour	\$78,750		July 1, 2021
<b>1.2. Threat &amp; Risk Assessment Services</b>					
Behavioral Threat Assessment and Suicide Prevention Module Subscription (1.2.1 Behavioral Threat Assessment Module, 1.2.2 Suicide Prevention Module)	259,450				
EDPlan Notifier Text Alerts (1.2.5 Notifier)					
BTA Annual Roster and User Integration with Clever (1.2.6 BTA Annual Roster & User Integration with Clever)					
Zendesk Support Desk Licenses	2				
BTA PaperClip (1.1.7 PaperClip)					

Invoicing Line Item	Units/ Year	Fee	3 Year Contract Amount	Invoicing Frequency	Start of Spending Authority
Sexual Misconduct Module Implementation (Consulting) (1.2.3 Sexual Misconduct Module)					
Fire Misuse Module Implementation (Consulting) (1.2.4 Fire Misuse Module)					
Bank of Hours (1.2.7 Bank of Hours)	50				
<b>1.3. Student Success Services</b>					
Student Engagement Plan Implementation (Consulting) (1.3.1 Student Engagement Plan)					
Student Engagement Plan Subscription (1.3.1 Student Engagement Plan)					
Functional Behavior Assessment/Behavior Intervention Plan Implementation (Consulting) (1.3.2 Functional Behavior Assessment/Behavior Intervention Plan (FBA/BIP))					
Functional Behavior Assessment/Behavior Intervention Plan Subscription (1.3.2 Functional Behavior Assessment/Behavior Intervention Plan (FBA/BIP))					
Bank of Hours					

Invoicing Line Item	Units/ Year	Fee	3 Year Contract Amount	Invoicing Frequency	Start of Spending Authority
(1.3.3 Bank of Hours)					
<b>2. Leadership &amp; Equity Services</b>					
Leadership Playbook Subscription (2.1.1.1 Leadership Playbook)	50	\$1,000/Administrator	\$150,000		July 1, 2021
Special Education Playbook Subscription (Teacher) (2.1.1.2 Special Education Playbook)	300				
Courageous Conversations Subscription (2.1.2.1 Courageous Conversations)	1,000	\$525/Educator	\$1,575,000		Aug 1, 2021
Courageous Conversations Implementation & Program Support (2.1.2.1 Courageous Conversations)		\$200,000/Cohort	\$600,000		Aug 1, 2021
Leadership & Teacher Support Module & Course Platform Subscription (1-2 Hour Course) (2.1.2.2 Leadership & Teacher Support Modules & Courses)	150				
Leadership & Teacher Support Module & Course Platform Subscription (3-6 Hour Course) (2.1.2.2 Leadership & Teacher Support Modules & Courses)	150				
In-person Professional Development - Content Development (2.1.3 In-person Professional Development)					

Invoicing Line Item	Units/ Year	Fee	3 Year Contract Amount	Invoicing Frequency	Start of Spending Authority
In-person Professional Development – Delivery (2.1.3 In-person Professional Development)					
Equity Coaching & Consulting (2.2 Equity Coaching & Consulting)					
Equity Co-lab (2.3 Equity Co-lab)	200				
Bank of Hours (2.4 Bank of Hours)					
<b>3. Interoperability Services</b>					
Roadmap Enhancements (3.1 SEPA Teacher App, 3.2 SEPA Provisioning & Rostering Services, 3.3 SEPA Administrator App, 3.4 SEPA Case Manager App, 3.5 SEPA Pathways Service, 3.6 SEPA Learning Content Management Service, 3.7 SEPA Achievement Assertion Services, 3.8 SEPA Student app, 3.9 SEPA Digital Wallet)	Limit of 14,343 total contract hours				
Bank of Hours (3.10 Bank of Hours for change orders only)	50				
Maintenance & Support					
<b>4. Accelerated Learning Services</b>					
TutorEd Tutoring	21,154	\$73/Tutoring Hour	\$1,544,242		May 1, 2021

Invoicing Line Item	Units/ Year	Fee	3 Year Contract Amount	Invoicing Frequency	Start of Spending Authority
(4.1 TutorEd Virtual Tutoring, 4.2 TutorEd In-person Tutoring & Interventions)					
EDForce Teacher Recruiting (4.3 EDForce Teacher Recruiting)					
EDForce Teacher Test Prep (4.4 EDForce Teacher Test Prep)					
EPIC Afterschool Services (4.5 EPIC Afterschool & Summer Camp Services)					
EPIC Summer Camp Services (4.5 EPIC Afterschool & Summer Camp Services)					
Logistics & Accountability Services (4.6, Program Logistics & Accountability Services)	2,160	\$100/Hour	\$216,000		May 1, 2021
Design, Coordination, Management Services (4.7 Program Design, Coordination & Management Services)			\$361,698		May 1, 2021
Education Recovery Center of Operations (4.8 Education Recovery Center of Operations)			\$687,000		May 1, 2021
Bank of Services (4.9 Bank of Services)			\$48,250		May 1, 2021

**Total: \$8,289,938**

Note: The red highlighted line items total the amount SBBC signed off on as the total contract value of \$8,289,938

**END OF CATEGORY 2 EXHIBITS**

# CATEGORY 3

Exhibit Number	Title of Document
Category 3: Verification of Invoice Schedule and Payment (Post-Contract)	
3.1	Invoicing Schedule Accessed by SBBC lists Document Language Translation as Separate Line Item
3.2	Approval of Invoice Schedule with No Dispute
3.3	Email from Tara Rodger Demonstrating ESS Subscription is Only "Part" of Invoice (Other "Part" is Translation)



# EXHIBIT 3.1

INVOICING SCHEDULE ACCESSED BY SBBC LISTS DOCUMENT LANGUAGE TRANSLATION  
AS SEPARATE LINE ITEM

Excel RETIRED Comprehensive System Support Invoicing Schedule FY22-24 Pending Updates - Saved

Search (Alt + Q)

Back to document July 22, 2021, 3:53 PM Save a Copy Restore Changes 0 of 0

Version History Show Changes

	A	B	C	D	E	F	G	H
	Project	Description	Service Period	Client Invoice Approver	Invoice Type (Up Front or Upon Completion)	Target Date	Amount	Pro Num
1	PCG Comprehensive Support Services						\$	
2	Exceptional Student Services	1.1 (Contract start date = 7/1/21)					\$	P005
3		Exceptional Student Services Subscription (1.1.1 through 1.1.7)	07/01/21 - 6/30/22	Seemone Hollingsworth, Teresa Hall and Tara Rodger	Up Front	7/1/2021	\$	
4		Document Language Translation (1.1.6 Document Language Translation)	07/01/21 - 6/30/22	Seemone Hollingsworth, Teresa Hall and Tara Rodger	Up Front	7/1/2021	\$ 75,000	
5		Exceptional Student Services Subscription (1.1.1 through 1.1.7)	07/01/22 - 6/30/23	Seemone Hollingsworth, Teresa Hall and Tara Rodger	Up Front	7/1/2022	\$	
6		Document Language Translation (1.1.6 Document Language Translation)	07/01/22 - 6/30/23	Seemone Hollingsworth, Teresa Hall and Tara Rodger	Up Front	7/1/2022	\$ 300,000	
7		Exceptional Student Services Subscription (1.1.1 through 1.1.7)	07/01/23 - 6/30/24	Seemone Hollingsworth, Teresa Hall and Tara Rodger	Up Front	7/1/2023	\$	
8		Document Language Translation (1.1.6 Document Language Translation)	07/01/23 - 6/30/24	Seemone Hollingsworth, Teresa Hall and Tara Rodger	Up Front	7/1/2023	\$ 300,000	
9		Bank of Hours (scope items 1.1.1 through 1.1.6)	MM/DD/YYYY - MM/DD/YYYY	Seemone Hollingsworth, Teresa Hall and Tara Rodger	Upon Completion	Ad-hoc	\$	
10	Health Record Management	1.1 (Contract start date = 7/1/21)					\$	P005
11		Electronic Health Record Module Subscription (1.1.13 Electronic Health Record Module)	07/01/21 - 6/30/22	Antoine Hickman, Marcia Bynoe	Up Front	7/1/2021	\$	
12		Electronic Health Record Module Installation (1.1.13 Electronic Health Record Module)	07/01/21 - 12/31/21	Antoine Hickman, Marcia Bynoe	Upon Completion	1/1/2022	\$	
13								

Invoice Schedule

Version History

- November 22, 2021, 11:34 PM
  - Daniel, Cliff
  - Szekeres, Naomi
- October 29, 2021, 1:56 PM
  - Daniel, Cliff
- October 27, 2021, 12:34 PM
  - Daniel, Cliff
- October 20, 2021, 5:30 PM
  - Daniel, Cliff
- October 18, 2021, 2:07 PM
  - Daniel, Cliff
- August 2, 2021, 2:05 PM
  - Daniel, Cliff
- July 22, 2021, 3:53 PM
  - Tara A. Rodger
- July 20, 2021, 5:35 PM
  - Daniel, Cliff

Note: Due to the volume of content, a snapshot is included. The full file can be provided upon request.

# EXHIBIT 3.2

APPROVAL OF INVOICE SCHEDULE WITH NO DISPUTE

## Broward Invoicing



Szekeres, Naomi &lt;nszekeres@pcgus.com&gt;

To: Tara A. Rodger; Daniel, Cliff

Cc: Nelson Scruggs, Hollie

Follow up.

TaraCopy\_Broward Internal PCG Resource Management Workbook.xlsx  
255 KB

Tara,

Thank you so much for your time Friday... wanted to send a quick recap, along with an updated Excel sheet of the Invoice Schedule.

- This sheet is filtered to show only FY22 invoices due to date (excepting Accelerated Learning/UII).
- The filtered-on invoices depicted will come as the first set from Hollie, following the changes we discussed today.

Please let us know if you have any questions or concerns.

Best,  
Naomi

**Next Steps:**

1. Hollie to test email to AP :: [FNSaccounts payable@browardschools.com](mailto:FNSaccounts payable@browardschools.com)
  2. Hollie to confirm POs :: One bookkeeper in Tara's office sets up the POs :: contact: [joby.siepert@browardschools.com](mailto:joby.siepert@browardschools.com), [teresa.hall@browardschools.com](mailto:teresa.hall@browardschools.com)
  3. Hollie to update Invoices to reflect any new/highlighted yellow POCs + All invoice sends to cc' Joby and Teresa
  4. Cliff to update process doc to reflect (a) PO setup process, (b) All sends to AP email address w/ cc' to Joby/Teresa, along with Client Leads
  5. Tara to confirm with Medicaid monies; Hollie to hold on EdPlan Subscription sends until we confirm quarterly vs up front
  6. Naomi to update schedule to reflect changes & get posted to Client-facing SP site
- \*From there, PCG team to proceed with following revised process/schedule

**Updates:**

4 BTA Invoices  
2 SEPA Invoices  
Everything has been paid via bank transfer as of yesterday

**Lessons Learned:**

Did not go to AP - must go FIRST  
Make sure Broward Client Leads get those... part of them held up, weren't aware (also, get all in by deadline)

Project	Description	Service Period	Invoice Type (Up Front or Upon Completion)	Target Date	Fiscal Year	Amount	PCG Project Number	Status	Comment
Threat & Risk Assessment Se	Behavioral Threat Assessment and Suicide Prevention Module Subscription (1.2.1 Behavioral Threat Assessment Module, 1.2.2 Suicide Prevention Module)	07/01/21 - 6/30/22	Up Front	7/1/2021	2022	\$ [REDACTED]	P0054900.6	PCG Approved	created invoice
Threat & Risk Assessment Se	EDPlan Notifier Text Alerts (1.2.5 Notifier)	07/01/21 - 6/30/22	Up Front	7/1/2021	2022	\$ [REDACTED]	P0054900.6	PCG Approved	created invoice
Threat & Risk Assessment Se	BTA Annual Roster and User Integration with Clever (1.2.6 BTA Annual Roster & User Integration with Clever)	07/01/21 - 6/30/22	Up Front	7/1/2021	2022	\$ [REDACTED]	P0054900.6	PCG Approved	created invoice
Threat & Risk Assessment Se	Zendesk Support Desk Licenses	07/01/21 - 6/30/22	Up Front	7/1/2021	2022	\$ [REDACTED]	P0054900.6	PCG Approved	created invoice
Threat & Risk Assessment Se	BTA PaperClip (1.1.7 PaperClip)	07/01/21 - 6/30/22	Up Front	7/1/2021	2022	\$ [REDACTED]	P0054900.6	PCG Approved	created invoice
Health Record Management	Electronic Health Record Module Subscription (1.1.12 Electronic Health Record Module)	07/01/21 - 6/30/22	Up Front	7/1/2021	2022	\$ [REDACTED]	P0054900.3	PCG Approved	Created invoice
Exceptional Student Services	Exceptional Student Services Subscription (1.1.1 through 1.1.7)	07/01/2021 - 9/30/21	Quarterly Up Front	7/1/2021	2022	\$ [REDACTED]	P0054900.1	PCG Approved	invoice against existing quarterly Medicaid account/amount; issues another invoice for the yearly upfront remaining
Exceptional Student Services	Exceptional Student Services Subscription (1.1.1 through 1.1.7)	10/01/2021 - 12/31/2021	Quarterly Up Front	10/1/2021	2022	\$ [REDACTED]	P0054900.2	PCG Approved	invoice against existing quarterly Medicaid account/amount; issues another invoice for the yearly upfront remaining
Exceptional Student Services	Document Language Translation (1.1.6 Document Language Translation)	07/01/21 - 6/30/22	Up Front	7/1/2021	2022	\$ 75,000.00	P0054900.1	PCG Approved	Created invoice, Cherie approved
Interoperability Services	Equity Co-lab (2.3 Equity Co-lab)	05/01/2021 - 9/30/21	Quarterly Upon Completion	10/1/2021	2022	\$ [REDACTED]	P0054900.2	PCG Approved	Created invoice
Interoperability Services	Education Recovery Center of Operations (4.8 Education Recovery Center of Operations)	5/1/2021 - 10/15/2021	Upon Completion	10/16/2021	2022	\$ [REDACTED]	P0054900.2	PCG Approved	created invoice
Interoperability Services	Roadmap Enhancements (3.1 -3.9 SEPA Services)	05/01/2021 - 9/30/21	Quarterly Upon Completion	10/1/2021	2022	\$ [REDACTED]	P0054900.7	PCG Approved	created invoice
Interoperability Services	Maintenance & Support	07/01/2021 - 06/30/2022	Up Front	7/1/2021	2022	\$ [REDACTED]	P0054900.7	PCG Approved	created invoice
Leadership Playbook	Leadership Playbook Subscription (2.1.1.1 Leadership Playbook)	07/01/2021 - 06/30/2022	Up Front	8/1/2021	2022	\$ [REDACTED]	P0054900.2	PCG Approved	Elizabeth -- For the Playbook subscription, we thought we would be fully implemented by end of September but are still in process, so I would like to push the invoice to October.
Q1 Summary Check:						\$ [REDACTED]			

Note: Due to the volume of content, a snapshot is included. The full file can be provided upon request.

**From:** Szekeres, Naomi <nszekeres@pcgus.com>  
**Sent:** Wednesday, November 3, 2021 10:58 AM  
**To:** Tara A. Rodger <tara.rodger@browardschools.com>  
**Cc:** Scruggs, Hollie <hscruggs@pcgus.com>  
**Subject:** Re: PO Numbers for PCG Projects

Hi, Tara - limiting this audience to not confuse the conversation: one thing I'm noticing is that the FY22 total in your image does not match what we are tracking to in FY22. Is that an issue?

We have these totals built into our invoice schedule:

New Contract In Board Action FY'22:

0 - Program Management (contract 5.0) \$0  
 1 - Threat & Risk Management (contract 1.2.1-2) \$ [REDACTED] BTA/Suicide Prevention Module Subscription  
 \$ [REDACTED] EDPlan Notifier Text Alerts \$ [REDACTED] BTA Roster Integration with Clever \$ [REDACTED] Zendesk Support Desk  
 Licenses \$ [REDACTED] BTA PaperClip \$ [REDACTED]  
 2 - Health Record Management (contract 1.1.13) \$ [REDACTED] Electronic Health Record Module Subscription  
 \$ [REDACTED] Electronic Health Record Module Installation \$ [REDACTED]  
 3 - Exceptional Student Services (contract 1.1) \$ [REDACTED]  
 4 - EDPlan Enhancement Project (contract 1.1) \$0 Exceptional Student Services Subscription \$766,722 Document  
 Language Translation \$75,000 Bank of Hours \$ [REDACTED]  
 5 - Interoperability Services (contract 3.0) \$ [REDACTED] Equity Co-Lab \$ [REDACTED] Education Recovery Center of Operations  
 \$ [REDACTED] Roadmap Enhancements \$ [REDACTED] Bank of Hours \$ [REDACTED] Maintenance and Support \$ [REDACTED]  
 6 - Accelerated Learning (contract 4.0) \$ [REDACTED] TutorEd Tutoring \$ [REDACTED] Logistics & Accountability Services  
 \$ [REDACTED] Design, Coordination, Management Services \$ [REDACTED] Bank of Services \$ [REDACTED]  
 7 - Courageous Conversations (contract 2.1.2.1) \$ [REDACTED] Courageous Conversations Subscription \$ [REDACTED] CCAR  
 Program Support \$ [REDACTED]  
 8 - Leadership Playbook (contract 2.1.1.1) \$ [REDACTED] Leadership Playbook Subscription \$ [REDACTED]

Total \$ [REDACTED]

Thanks,  
 Naomi

**Szekeres, Naomi**

**From:** Tara A. Rodger  
**Sent:** Wednesday, November 3, 2021 12:13 PM  
**To:** Szekeres, Naomi  
**Cc:** Nelson Scruggs, Hollie  
**Subject:** Re: PO Numbers for PCG Projects

Do not worry about coding lines not equaling. That is my concern and not yours. I just needed to get my peeps on the correct page

*Sincerely,*

**Tara A. Rodger**

Electronic Management System Manager  
 John McKay Scholarship District Contact  
 Exceptional Student Learning Support  
 Arthur Ashe, Jr Campus  
 1701 NW 23rd Ave, Suite 270, Ft. Lauderdale FL 33311  
 office:754-321-3400 #2  
 email: tara.rodger@browardschools.com  
 website: [www.bcps-eseandsupportservices.com](http://www.bcps-eseandsupportservices.com)

# EXHIBIT 3.3

EMAIL FROM TARA RODGER DEMONSTRATING ESS SUBSCRIPTION IS ONLY “PART” OF  
INVOICE (OTHER “PART” IS TRANSLATION)

**From:** Scruggs, Hollie <hscruggs@pcgus.com>  
**Sent:** Monday, November 8, 2021 9:55 AM  
**To:** Tara A. Rodger <tara.rodger@browardschools.com>  
**Cc:** Szekeres, Naomi <nszekeres@pcgus.com>  
**Subject:** Re: PO Numbers for PCG Projects

Hi Tara.

For the exceptional children, we have them as quarterly currently. I remember you saying during a phone call you needed it quarterly because of the way your federal funding is set up. Is this true or can we bill for the whole year up front?

Hopefully the last question

Thanks,  
Hollie

### **Szekeres, Naomi**

---

**From:** Tara A. Rodger  
**Sent:** Monday, November 8, 2021 10:11 AM  
**To:** Nelson Scruggs, Hollie  
**Cc:** Szekeres, Naomi  
**Subject:** Re: PO Numbers for PCG Projects

Yes, please send quarterly for the IEP part. Remember that part of this comes from Medicaid and we are currently working with a Task assigned Medicaid Coordinator.

*Sincerely,*

### **Tara A. Rodger**

Electronic Management System Manager  
John McKay Scholarship District Contact  
Exceptional Student Learning Support  
Arthur Ashe, Jr Campus  
1701 NW 23rd Ave, Suite 270, Ft. Lauderdale FL 33311  
office: 754-321-3400 #2  
email: tara.rodger@browardschools.com  
website: [www.bcps-eselandsupportservices.com](http://www.bcps-eselandsupportservices.com)

**END OF CATEGORY 3 EXHIBITS**