

## Berrios-montijo, Elsa

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**From:** Vann, Allen M.  
**Sent:** Tuesday, October 09, 2007 10:48 AM  
**To:** Angulo, Susan Dr.; Kressel, Roberta; Moscovitz, Jane W.; Mullane, Susan Dr.; Regna, Daneen; Thornburg, Frederick (Buck) F.  
**Cc:** Berrios-montijo, Elsa; Ferradaz, Norberto; Martinez, Ileana  
**Subject:** School Board Lobbyist Rule

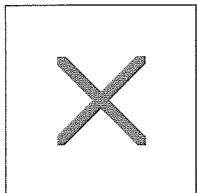
I am forwarding the following two links, which contains the Boards WEB Page for Lobbyists and the Board Rule. This background material should help facilitate our discussion at the upcoming October 26th Ethics Advisory Committee meeting on this topic.

<http://www2.dadeschools.net/schoolboard/lobbyist.asp>

<http://www2.dadeschools.net/schoolboard/rules/Chapt8/8c-1.21.pdf>

*Allen M. Vann, CPA*

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### Lobbyist Registration Forms

School Board Rule 8C-1.21, Lobbyists

Please note, the space provided for the Filing Date on the bottom of each form will be completed and signed by the School Board Clerk upon receipt. A copy of the form signed by the School Board Clerk will be provided for your records.

English

Spanish

Creole

Miami-Dade County Public Schools Lobbyist Expenditure Report

To access the Lobbyist Registration Forms, Adobe Acrobat Reader is required. Download your free copy at [Adobe.com](http://Adobe.com)

*Please submit Lobbyist Registration Forms, fee, and required documents to:*

Office of the School Board Clerk  
Miami-Dade County Public Schools

1450 N.E. Second Avenue, Suite # 268 B  
Miami, Florida 33132

Facsimile No.: 305-995-1448

For additional information, please call 305-995-1440.

### Lobbyists (July 2007 - June 2008)

Last Name	First Name	Principal Represented	File Date	Ending Date
Arza	Hugo P.	Read and Succeed, LLC	8/28/2007	6/30/2008
Balsera	Alfredo J.	FJP Hotel Group d/b/a/ FJP Group	7/2/2007	6/30/2008
Burton	Truly	Builders Association of South Florida	7/2/2007	6/30/2008
Draper	Duane D.	Bryant Miller Olive P.A.	8/3/2007	6/30/2008
Heckler	Alexander P.	Gilly Vending, Inc.	7/10/2007	6/30/2008
Llorente	Marcelo	Bryant Miller Olive P.A.	8/3/2007	6/30/2008
Malooof	Al	Vista Healthplan a/k/a Coventry Healthcare	9/18/2007	6/30/2008
Marin	Steven	Zyscovich, Inc.	7/2/2007	6/30/2008
Marin	Steven	Pirtle Construction Company	7/2/2007	6/30/2008
Marin	Steven	Learning Today, Inc.	7/2/2007	6/30/2008
Marin	Steven	Riverdeep, Inc.,LLC	7/2/2007	6/30/2008
Marin	Steven	Recreational Design & Construction	7/2/2007	6/30/2008
Marin	Steven	Community Blood Centers of South Florida, Inc.	7/2/2007	6/30/2008
Mayol	Juan J.	Renaissance Joint Venture	10/3/2007	6/30/2008
Melton III	Eston E.	MAXIMUS, Inc.	10/4/2007	6/30/2008
Mesa	Alfredo	Wireless Generation	7/5/2007	6/30/2008
Mesa	Alfredo	South Miami Sports Medicine	7/5/2007	6/30/2008
Mesa	Alfredo	Vista Healthplans	7/10/2007	6/30/2008
Mesa	Alfredo	Apangea Learning, Inc.	7/5/2007	6/30/2008
Planas	Juan Carlos	Gilly Vending, Inc.	7/11/2007	6/30/2008
Rodriguez Pina	Rick J.	SAP Public Services	7/2/2007	6/30/2008
Rodriguez Pina	Rick J.	Meridian Partners	7/2/2007	6/30/2008
Rodriguez Pina	Rick J.	got breakfast? Foundation	7/23/2007	6/30/2008
Rodriguez Pina	Rick J.	Kronos Incorporated	8/9/2007	6/30/2008
Rodriguez Pina	Rick J.	Vista Healthplans	9/5/2007	6/30/2008
Smith	George A.	Bryant Miller Olive P.A.	8/3/2007	6/30/2008
Soto	Javier	Vista Healthplans	7/10/2007	6/30/2008

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**School Board--Methods of Operation****LOBBYISTS****I. Purpose**

The School Board of Miami-Dade County, Florida, hereby determines and declares that the operation of responsible government requires that the fullest opportunity be afforded to the people to petition the School Board and Miami-Dade County Public Schools to express freely their opinions on School Board actions and issues; and that to preserve and maintain the integrity of the governmental decision-making process, it is necessary that the identity, expenditures, fees, and activities of certain persons who engage in efforts to influence actions of School Board members and employees either by direct or indirect communication be publicly and regularly disclosed.

Lobbyist means any individual, firm, or corporation compensated by or who contracts for economic consideration from any principal person or organization for the purpose of lobbying. Lobbying means any oral or written communication, direct or indirect with the School Board, members of the School Board, School Board Committees, School Board Administrative Assistants, School Board Attorneys, or members of the Miami-Dade County Public Schools administrative staff, for the purpose of influencing any action, non-action, or decision or attempting to obtain the good will of a School Board member or employee of the school district.

For purposes of this rule, the term "Lobbyist" specifically includes the principal as well as any agent, officer, or employee of a principal regardless of whether employees of the principal whose normal scope of employment does not include lobbying activities. A lobbyist is not considered to be a person representing school allied groups, e.g.: Parent Teacher Association (PTA); Educational Excellence School Advisory Councils (EESAC); etc., a public official acting in his or her official capacity; attorneys retained to represent individuals or entities in quasi-judicial proceedings; expert witnesses providing information in a public meeting; or representatives of non-profit organizations who only appear at meetings without compensation.

**II. Registration**

Lobbyists, shall annually complete a Lobbyist Registration Form providing the following information:

Name;

Business phone;

Mailing address;

Principal represented;

Principal's business address and telephone number;

The subject matters which the lobbyist seeks to influence; and

Any current member of the School Board or Miami-Dade County Public Schools administration, School Board Administrative Assistant, or School Board Attorney, with whom the lobbyist or his/her principal has any direct business association.

In addition to the information above, every registrant shall be required to state the extent of any business, financial, familial or professional relationship, or other relationship with any current Member of the School Board or Miami-Dade County Public Schools Administration who is sought to be lobbied as identified on the lobbyist registration form filed.

This form shall be filed by the lobbyist with the Office of the School Board Clerk by July 1<sup>st</sup> of each year, or when an individual becomes a lobbyist. Registration must be renewed by July 1<sup>st</sup> of each subsequent year or lapse. A separate registration form must be filed for each principal represented. Under no circumstances will any lobbyist be permitted to address the School Board at public meetings until the Lobbyist Registration Form is filed. Further, members of the School Board, Miami-Dade County Public Schools administration, School Board Administrative Assistants and School Board Attorneys will not discuss School Board business with such person when such lobbyist is meeting to influence Board action until the lobbyist has so registered.

The fee for annual registration shall be \$125.00. The registration fees required by this subsection shall be deposited by the School Board Clerk into an account and shall be expended for the purpose of recording, transcribing, administration and other costs incurred in maintaining these records for availability to the public. There shall be no fee required for filing a notice of withdrawal and the School Board may, in its discretion, waive the registration fee upon a finding of financial hardship.

No information obtained from lobbying statements required by this article shall be sold or utilized by any person for the purpose of soliciting campaign contributions or fund-raising affair or for commercial purposes.

Upon being advised by a lobbyist that he/she is no longer representing a principal, the School Board Clerk will cancel the applicable Lobbyist Registration Form.

Prior to any lobbyist or principal conducting any lobbying, each principal must file a form with the School Board Clerk, signed by the principal or the principal's duly authorized representative, stating that the lobbyist is authorized to represent the principal. Failure of a principal to file the required form may be considered in the evaluation of a bid, proposal or prequalification criteria as evidence that a proposer or bidder is not a responsible contractor. Each principal shall file a form with the School Board Clerk at the time at which a lobbyist is no longer authorized to represent the principal.

### III. Reporting Requirements

Commencing upon final adoption, and on July 1<sup>st</sup> of each year thereafter, lobbyists shall submit to the School Board Clerk an Expenditure Report under oath as provided herein listing all School Board lobbying expenditures for the preceding calendar year. A statement shall be filed even if there have been no expenditures during the reporting period. A separate statement shall be filed for each principal represented. The statement shall list in detail each expenditure by category, including food and beverage, entertainment, research, communication, media advertising, publications, travel, lodging, and special events.

Prior to any lobbyist or principal engaging in any lobbying, each principal must submit to the School Board Clerk a statement under oath disclosing the terms and amount of compensation paid, and to be paid, by each principal to the lobbyist with regard to the specific School Board matters on which the lobbyist has been engaged to lobby. If no compensation has or will be paid concerning the subject lobbying services, a statement shall nonetheless be filed reflecting as such.

Each principal and lobbyist has a continuing duty to supply accurate information and amend said registration and reports when so needed.

IV. Prohibited Activities

No person shall accept employment as a lobbyist on a basis which makes that person's compensation contingent in any manner upon the approval, rejection, or modification of any action, non-action or decision of the School Board; School Board members; School Board Committee; Miami-Dade County Public Schools administrative staff; School Board Administrative Assistants, or School Board Attorneys.

V. Investigations

The School Board Inspector General shall investigate any person engaged in lobbying activities who may be in violation of this rule. In the event that a violation is found to have been committed, the Inspector General shall make a recommendation to the School Board consistent with the penalties set forth in Section VI.

VI. Penalties

The School Board may warn, reprimand, or censure any lobbyist violating any of the provisions of this rule, or may suspend the lobbyist from lobbying the School Board for a period of time; provided, however, that any suspension may not exceed a period of two (2) years, and no sanction shall be imposed until the lobbyist allegedly in violation has had reasonable notice and an opportunity to be heard before The School Board's Ethics Advisory Committee. The Ethics Advisory Committee will make a recommendation to the School Board, provided, however, any such recommendation shall be in addition to any other action recommended by the Inspector General.

Specific Authority: 1001.41(1)(2); 1001.42(22); 1001.43(10) F.S.

Law Implemented, Interpreted or Made Specific: 1001.41(1)(3) and (5) F.S.

**History: THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA**

New: 8-23-89

Technical Change: 5-1-98

Amended: 8-20-03