

# 2009 Amended P5 Client Periodic Report

Lobbyist Name: The College Board

Client Name: The College Board

## Lobbyist Information

Principal Officer Name Munoz, Marissa

Principal Officer Title Education Manager

Principal Officer Email BLOCKED\_EMAIL

Principal Officer Phone (212) 520-8552

Lobbyist Business Name The College Board

Lobbyist Business Address 45 Columbus Avenue, New York, NY 10023

Lobbyist Business Phone (212) 520-8552

## Client Information

Client Name The College Board

Business Address 45 Columbus Avenue, New York, NY 10023

Client P.O. Name Munoz, Marissa

Business Phone (212) 520-8552

Business Email BLOCKED\_EMAIL

## Employee(s) Lobbying for Client

### Employee # 1

Employee's Name Fallon, John

Employee's Work Address 45 Columbus Avenue, New York, NY 10023

Employee's Work Phone (646) 831-2574

### Employee # 2

Employee's Name Munoz, Marissa

Employee's Work Address 45 Columbus Ave., New York, NY 10023

## 2009 Amended P5 Client Periodic Report

Lobbyist Name: The College Board

Client Name: The College Board

Employee's Work Phone (212) 520-8552

### Employee # 3

Employee's Name Crockrell, Antoinette

Employee's Work Address 45 Columbus Avenue, New York, NY 10023

Employee's Work Phone (212) 649-8467

### Employee # 4

Employee's Name D'Aliosio, Fabrizio

Employee's Work Address Two Bala Plaza, Bala Cynwyd, PA 19004

Employee's Work Phone (610) 227-2531

### Employee # 5

Employee's Name Fails, Lee

Employee's Work Address 3700 Crestwood Parkway, Ste 700, Duluth, GA 30096

Employee's Work Phone (770) 225-4018

### Employee # 6

Employee's Name Montoya, James

Employee's Work Address 45 Columbus Avenue, New York, NY 10023

Employee's Work Phone (212) 713-8330

### Employee # 7

Employee's Name Parente, Chris

Employee's Work Address 45 Columbus Avenue, New York, NY 10023

Employee's Work Phone (212) 713-8128

# 2009 Amended P5 Client Periodic Report

Lobbyist Name: The College Board

Client Name: The College Board

## Lobbying Activities

### Activity # 1

**Subject Category** Small Learning Communities contract update

**Subject Details** Sept. 4th- Marissa Munoz had a phone call with Aaron Turner regarding the SLC SB contract and implementation

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

### Activity # 2

**Subject Category** College Readiness Initiative Teleconference

**Subject Details** Sept 8--Jim Montoya and Lee Fails had a teleconference with Santi Taveras, Photo Anagastopoulos, and Jennifer Bell-Ellwanger to discuss College Readiness Initiative

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

### Activity # 3

**Subject Category** College Readiness Initiative- Meeting Preparation

**Subject Details** September 14th- Marissa Munoz, John Fallon, Lee Fails, Jim Montoya prepared for the meeting with NYC DOE Senior Leadership

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

### Activity # 4

**Subject Category** SpringBoard Implementation discussion with SLC school (August Martin)

**Subject Details** Sept. 14th- Marissa Munoz met with Michael Frank, AP of August Martin HS and AP of ELA to discuss SB ELA implementation

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

### Activity # 5

# 2009 Amended P5 Client Periodic Report

Lobbyist Name: The College Board

Client Name: The College Board

## Subject Category

Initial Face to Face meeting with NYC DOE Senior Leadership to discuss CR Initiative

## Subject Details

Sept 15--Jim Montoya and Lee Fails had a face to face meeting with Santi Taveras, Photo Anagastopoulos, and Jennifer Bell-Ellwanger at TWEED.

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 6

### Subject Category

Meeting with NYC DOE Summative Assessment Team to discuss PN data pilot rollout and deliverables

### Subject Details

September 17th- Marissa Munoz met with NYC DOE's summative assessment team, Niket Mull, Chris Sandor, Emily Weiss, and Lisa Goldschmidt to discuss PN.

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 7

### Subject Category

PN presentation to NYC DOE assessment team and HS testing coordinators

### Subject Details

September 22nd- Marissa Munoz spoke to members of the NYC DOE Assessment and Accountability team(Grace Pepe, Rita Magier, Chris Sandor, Niket Mull) as well as High School Testing Coordinators about the PSAT/NMSQT administration and testing procedures

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 8

### Subject Category

Campaign for Middle School Success meeting

### Subject Details

September 23rd- Marissa Munoz gave a SpringBoard presentation to Middle School Principals attending the Campaign for Middle School Success (CMSS) event at PS 38 in Brooklyn\_ spoke with Verone Kennedy, NYC DOE's Middle School Coordinator

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 9

### Subject Category

PN rollout planning session with NYC DOE Summative Assessment Team

# 2009 Amended P5 Client Periodic Report

Lobbyist Name: The College Board

Client Name: The College Board

## Subject Details

September 24th- Marissa Munoz performed a PSAT/NMSQT walkthrough via webex with the NYC DOE summative assessment team (Lisa Goldschmidt, Chris Sandor, Niket Mull) to prepare for rollout of data pilot

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 10

### Subject Category

New Visions initial partnership meeting

### Subject Details

September 25th- Marissa Munoz met with Jana Chandler, Omar Morris, and Ruth Genn at New Visions to speak about how we could strengthen our partnership, especially in informing counselors of the free CB resources that they have

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 11

### Subject Category

Joint PN presentation with the NYC DOE summative assessment team

### Subject Details

September 29th and 30th- Marissa Munoz performed a joint presentation with the NYC DOE summative assessment team (Lisa Goldschmidt and Chris Sandor) to the PSAT/NMSQT data pilot school leadership

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 12

### Subject Category

Follow-Up teleconference with NYC DOE Senior Leadership

### Subject Details

September 29--Marissa Munoz, Lee Fails, Jim Montoya conducted a teleconference with Santi Taveras, Photo Anagastopoulis, Greg Bethel, and Jennifer Bell-Ellwanger

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 13

### Subject Category

Preparation and Planning for NYC DOE meeting

# 2009 Amended P5 Client Periodic Report

Lobbyist Name: The College Board

Client Name: The College Board

## Subject Details

October 13- Marissa Munoz, John Fallon, Lee Fails, Jim Montoya, Bob Alig, Antoinette Crockrell conducted preparation and Planning for NYC DOE meeting

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 14

### Subject Category

Face to Face meeting with NYC DOE senior leadership to discuss CR Initiative

## Subject Details

October 14- Marissa Munoz, John Fallon, Lee Fails, Jim Montoya, Bob Alig, Antoinette Crockrell had a Face to Face meeting with Santi Taveras, Photo Anagastopoulos, Greg Bethel, Alison Avera, Joanna Lack, and Jennifer Bell-Ellwanger

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 15

### Subject Category

Fall Counselor Workshoplike presentation to New Visions Counselors

## Subject Details

October 15- Marissa Munoz met with Omar Morris and Ruth Genn before presenting an abbreviated FCW to the New Vision HS Counselors

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 16

### Subject Category

MS Initiative- SpringBoard training

## Subject Details

October 16- Marissa Munoz and John Fallon met with Ellen Garcia and Anna Committante, NYC DOE Director of ELA Curriculum and Instruction, before the SB Admin training for schools participating in the MS Initiative

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 17

### Subject Category

PN data details meeting with NYC DOE summative assessment team

# 2009 Amended P5 Client Periodic Report

Lobbyist Name: The College Board

Client Name: The College Board

## Subject Details

October 20- Marissa Munoz and John Fallon met with NYC DOE Summative Assessment team, Lisa Goldschmidt, Niket Mull, Chris Sandor, to discuss the PSAT/NMSQT data specs

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 18

### Subject Category

MS Initiative- SpringBoard Admin training

### Subject Details

October 20- Marissa Munoz met with Ellen Garcia and Verone Kennedy, NYC DOE Middle School Coordinator, before the SB Admin training for schools participating in the MS Initiataive

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 19

### Subject Category

Fall Counselor Workshop at National Forum

### Subject Details

October 21- Marissa Munoz and John Fallon presented the Fall Counselor Workshop to NYC and are guidance counselors\_ Joanna Lack and Lisa Anzalone from the NYC DOE Postsecondary Pathways office were also in attendance

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Activity # 20

### Subject Category

planning for NYC DOE FCW on Nov. 3rd.

### Subject Details

October 21- Marissa Munoz, Bob Alig, and John Fallon met with Lisa Anzalone and Joanna Lack to discuss upcoming NYC DOE specific workshop, as well as workstreams for new College Readiness Initiative

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York city Department of Education |

## Activity # 21

### Subject Category

Nov. 3rd workshop for NYC DOE counselors- powerpoint planning

## 2009 Amended P5 Client Periodic Report

Lobbyist Name: The College Board

Client Name: The College Board

### Subject Details

October 28- Marissa Munoz- NYC DOE FCW presentation planning and prep meeting with Joanna Lack, Lisa Anzalone, and Greg Beithel from the Postsecondary Pathways Office

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

### Activity # 22

#### Subject Category

E-mail, phone calls, meeting prep and planning

#### Subject Details

John Fallon and Marissa Munoz: E-mail, phone calls, and other planning and preparation related to the College Readiness Initiative, PSAT/NMSQT administration and data, SpringBoard training and contracts (SLC and MS Initiative)

| Target          | Office/Department | Contact Name                          |
|-----------------|-------------------|---------------------------------------|
| Business Entity |                   | New York City Department of Education |

## Summary of Compensation

Total Compensation Paid or Owed for Current Period \$9,503.00

Year to Date Total Compensation Paid or Owed \$40,470.00

## Lobbying Expenses

Aggregate of all expenses for salaries of support staff \$200.00

Total of Aggregate Expenses \$75.00 or less \$50.00

Are there expenses greater than \$75.00? No

Itemized Expense Total \$0.00

Total Expenses for Current Period \$250.00

Year to Date Total of Expenses \$2,450.00

## 2009 Amended P5 Client Periodic Report

Lobbyist Name: The College Board

Client Name: The College Board

### CERTIFICATION

I certify that all statements made on this report are true and correct to the best of my knowledge and belief, and I understand that the willful false statement of any material fact herein will subject me to the provisions of law relevant to the making of false instruments and will render such statement null and void.

|                        |                |
|------------------------|----------------|
| Principal Officer Name | Munoz, Marissa |
|------------------------|----------------|

|                         |               |
|-------------------------|---------------|
| Principal Officer Email | BLOCKED_EMAIL |
|-------------------------|---------------|

|                    |                  |
|--------------------|------------------|
| Certification Date | 01/11/2010 16:48 |
|--------------------|------------------|

### ELECTRONIC SIGNATURE

Marissa Munoz was required to indicate acceptance of the representations made in the following statement by entering his or her password used to access the E-Lobbyist, New York City Lobbyist Filing System and pressing the Submit button to affix his or her electronic signature and file the report with the Office of City Clerk - City of New York.

"I certify that all statements made on this report are true and correct to the best of my knowledge and belief, and I understand that the willful false statement of any material fact herein will subject me to the provisions of law relevant to the making of false instruments and will render such statement null and void."