

Agenda of Ad Hoc Committee

The Board of Trustees Montgomery County IU

A Ad Hoc Committee of the Board of Trustees of Montgomery County IU will be held Tuesday, August 11, 2026, beginning at 6:00 PM Virtual via Zoom.

1. Meeting Opening

1.a. Call to Order

1.b. Pledge of Allegiance

Description:



1.c. Roll Call

Description:

The members of the Ad Hoc Committee

Dr. Wendy Bailey (Upper Dublin)

Amanda Blanton (Lower Moreland Twp), Chair

Annique-Ruiz Brown (Pottsgrove)

Dr. Robert Jarvis (Hatboro-Horsham)

Robert Liggett (Perkiomen Valley)

Dr. Gary Ledebur (Upper Merion Area)

Greg D'Elia (Upper Moreland)

Dr. Margaret Wright (Spring-Ford Area)

2. Announcements

2.a. Recording of Meeting

3. Presentations

3.a. Final Report

Speaker(s): Mark Klein, Esq.

4. Ad Hoc Committee Chair - Summary

Speaker(s): Amanda Blanton

4.a. Discussion

5. Persons Desiring to Be Heard

6. Adjournment

Mark J. Klein

Attorney at Law

FINAL REPORT EXECUTIVE SUMMARY

On May 4, 2026, Mr. Jeffrey Sultanik, MCIU Board Solicitor, on behalf of the Ad Hoc Committee (“Committee”) formed by the Board of the Montgomery County Intermediate Unit (“MCIU”) engaged me to investigate process, policy and other matters as identified by the members of Committee in the matter of professional development travel taken by Executive Director, Dr. Regina Speaker.. Mr. Mark Fitzgerald was named as counsel to the Committee. In early May, I received a set of instructions from the Committee to guide my investigation.

These are the five (5) elements to the instructions provided by the committee and a brief summary of my findings:

1. A specific investigation into the AASA and AESA sponsored international travel. The committee would specifically like to determine how the process for approving such trips occurred, whether this is a typical process in the IU and why the specific request did not come before the Board of Directors as would be typical in sending school districts.

In pursuit of findings for these instructions, I interviewed the Executive Directors of the American Association of School Administrators (“AASA”) and the Association of Educational Service Agencies (“AESA”). In those conversations, I learned about the delegations that visited Africa in 2023 and Singapore/Korea in 2025. The AASA delegation visited schools in Africa and, in particular, the International School of Nairobi. That school was beginning a program for students with special needs. The expertise embedded in this delegation was intended to help this school with the formation of this program. The Executive Director from AASA attended this trip but was not in this position at that time. AASA was not helpful in understanding both the itinerary and the outcomes for this trip and provided very little information or documentation to support this trip.

The Executive Director of AESA gave a comprehensive overview of the leadership training and delegation experiences in 2025. This trip, attended by two other Pennsylvania Intermediate Unit Directors, was the culmination of a yearlong Leadership Academy that included AESA meetings in July, August, September, October and February in advance of the 2025 summer travel. The itinerary was comprehensive, including school visits and leadership experiences on every day except those that were set aside for travel.

The cost of the AASA travel was \$9500.00 for Dr. Speaker and Assistant Executive Director Sandy Edling, who were both part of this delegation. The cost was paid using their MCIU Procurement Cards. These Procurement Card charges were approved by the MCIU Board during their meetings in 2023.

The cost of the AESA travel was \$13,000.00. The cost was paid by Dr. Speaker using her MCIU Procurement Card. The cost was divided into two payments – one in November, 2024 and a second in May 2025. These Procurement Card charges were approved by the MCIU Board.

These trips did not receive prior approval by the MCIU Board. There was no requirement in Board policy that these trips be approved by the Board and past practice, across at least two other IU Executive Directors, showed there was not Board approval for Executive Director professional development. This issue will be addressed in policy recommendations, below.

2. What policies, written or otherwise, are in place to address travel approvals? How do those policies align with the trips noted in #1 above? Based on your review of those policies pursuant to this investigation, what proposed changes need to be addressed? What potential policies or procedures need to be added?

I completed a review of MCIU Board Policy to determine whether there were requirements for Board approval for this travel. In addition, I looked at the requirements for approval of Professional Development across the MCIU organization and the use of Procurement Cards. There was no MCIU policy that covered travel by the Executive Director. There was also no reference to travel in her employment agreement with the MCIU. Travel by other members of the MCIU staff had an identified organization approval process.

In my report, I made specific recommendations to the Board on policy and administrative regulations. A specific process should be developed for the Executive Director to seek approval for travel. A defined process to report employee professional development opportunities to the Board should also be implemented.

3. Stakeholder and Community impact. How have the events that led to the issue herein impacted subgroups within the organization (Act 93 groups, support groups, professional associations, etc.) as well as community stakeholders such as school districts, Early Intervention and Head Start Partners, etc.?

To gather information on this committee charge, I interviewed twenty-five (25) stakeholders including superintendents serving in Montgomery County and IU Executive Directors from this four county area and other parts of the state. I interviewed members of the MCIU staff, including administrators and professional employees, who served in multiple areas of the MCIU including Early Intervention, Head Start, and Special Education services. I interviewed Dr. Speaker and Ms. Edling on multiple occasions.

Using a defined protocol, I examined stakeholder feedback on the March, 2025 Inquirer article. The interviews asked for reactions from stakeholders, including Boards and other school administrators, and how this affected their relationship with both the MCIU and Dr. Speaker. Superintendents and Executive Directors represented varied reactions to this article including additional scrutiny of MCIU contracts and, in close proximity to the timing of the article, concerns about organization travel and practice. Some expressed concerns about “optics” and communication from MCIU that followed. Superintendents and Executive Directors reported they initiated a review of their travel policy and procedures in the aftermath of this article. Each continued to report a good relationship with Dr. Speaker and trust in her leadership.

With respect to MCIU employees, representatives from Early Intervention and Head Start were clear the issues that were reported in public comment on classroom supplies were a result of the Pennsylvania budget impasse. MCIU administrators consistently reported Dr. Speaker’s reputation as a leader was strong and they saw no evidence – this year or in the past – that criticism of the Executive Director was met with some form of retaliation. Each was clear they still trusted Dr. Speaker to lead MCIU.

4. Personnel and/or employment related recommendations or issues that present as part of this analysis. The committee desires to give you flexibility to explore issues that may impact personnel matters if your investigation determines an act is a founded violation of policy or law.

I did not find any basis within this investigation to recommend any employee discipline. There was no founded violation of MCIU Board Policy.

5. Global recommendations for the committee that will be shared with the committee and eventually the Board of Directors.

I made the following recommendations to the Ad Hoc Committee based on my investigation.

- Conduct an audit of the MCIU policy and practice for using Procurement Cards.
- Based on templates and other information provided in the report, examine and revise MCIU Board Policy on Professional Development including requiring prior Board approval for travel by the Executive Director. This recast of Professional Development policy should also provide oversight/review of professional development travel requests and denials by identified members of the MCIU Executive Committee.
- Policy reviews should be vetted and approved by the MCIU solicitor.