

The Unveiling of the Bergeson Administration's Vision:  
The Iniquity Exposed  
Part II

The Possibilities School series was developed by Carkhuff Thinking Systems and the Washington State Office of the Superintendent of Public Instruction. Dr. Terry Bergeson, State elected Superintendent, Dr. Shirley McCune, Assistant Superintendent Federal Liaison, and Dr. Andrew Griffin, Assistant Superintendent Community Outreach, participated in the development, promotion and implementation of the Possibilities Schools. In order to fund the Possibilities School program Dr. Bergeson submitted four applications to the U.S. Department of Education to receive funds provided under the program titled, "Linking Educational Reform and Educational Technology." The grant award numbers, title of project, proposed project dates and the amount awarded are as follows:

R215R980003—*Linking educational Reform and Educational Technology*—  
August 1998 to August 2000—\$5million

R215R990023—*Education for the 21<sup>st</sup> Century*—June 1999 to May 2000—\$3  
million

R303K000037—*Possibilities Schools*—June 2000 to May 2001—\$2.775million

R303K010044—*Development of Mathematics and Science Web-Based Learning  
Resources for Middle and High School Teachers and Students*—July 2001 to July  
2003—\$1.275million

There were four other states involved with the grants: Arkansas, California, Illinois and Pennsylvania. The final grant did not include the LINKS consortium of five States; Dr. Terry Bergeson and Dr. Shirley McCune are the only two members listed in the final grant. Approximately 13 million dollars was awarded to fund the LINKS Project having a goal to develop, promote and implement the Possibilities Schools, specifically each grant "expanded [the] evolution of requirements to reflect the New Three Rs." The integration of technology and reform by using The New 3Rs is the intended outcome of the LINKS Project. Dr. Shirley McCune and Dr. Terry Bergeson headed the project. There were many contractors involved with the project; each contractor served to further the teachings of Robert Carkhuff and Dr. Shirley McCune. Other contractors may be mentioned, but for the purpose of this discussion the contracts with Carkhuff Thinking Systems will be the focus. Carkhuff Thinking Systems was awarded two contracts to accomplish the following tasks:

Contract number 102A-2 (\$400,000-October 1, 1998 to September 30, 2000):

General Objective: To conceptualize and develop educational materials for students and educators on the skills requirements for the twenty-first century, i.e., relating,

representing, and reasoning. These materials will extend current teaching and learning toward the development of higher order information processing and thinking skills within the framework provided by the Washington essential academic learning requirements.

Duties: Conceptualize and develop the curriculum resources: (a) Analyze existing literature and knowledge and conceptualize the essential information processing and thinking skills that will be required by the changed environment of the twenty-first century; (b) Develop a curriculum framework for effective teaching and learning of the required skills in the areas of relating, representing, and reasoning within the Washington essential academic learning requirements; (c) Develop paper and online resources for students and educators to support their teaching and learning of the skills and processes.

Contract number 120-486 (\$667,500-May 1, 2000 to December 31, 2001):

Task 1: Organize and facilitate experts and educators in the mapping of the elementary, secondary areas of reading, writing, communication, mathematics, and science and prepare them within a context suitable to inputting on the Web.

Task 2: The design, preparation of materials, and facilitation of five state seminars on Possibilities Schools for policy makers and decision-makers.

Task 3: Development of a Web enabled interactive professional development program content for principals, teachers, students, and parents. This development should include a minimum of five modules for each group, including the mapped curriculum materials for teachers and administrators.

The grants awarded the State of Washington served to fund the Carkhuff Thinking Systems contracts, as well as fund the promotion and implementation of the teachings associated to the Possibilities Schools. In order to give a first hand account of what led to uncovering the truth behind the Possibilities Schools agenda a first person narrative describing the events that uncovered the truth about the Bergeson Administration's vision will be presented.

My name is Nancy Vernon, and this is my story.

In September 2003, I was inspecting documents at the Washington State Office of the Superintendent of Public Instruction, and came across contract number 101-1 awarded Carkhuff Thinking Systems for \$25,000. The contract start date was February 1998; however, services were rendered in 1997. A letter from Assistant Superintendent Mike Bigelow dated January 23, 1998, and addressed to Dick Thompson, Director of the Office of Financial Management provides an explanation for the late filing of the sole source contract with Carkhuff Thinking Systems. In the letter Mr. Bigelow claims the late filing "is due to confusion between OSPI and the Boeing Corporation as to how the contract

would be paid. Boeing is providing a grant...to pay for the services rendered by Carkhuff Thinking Systems.” Included with the documents was a letter dated January 7, 1998, to Dr. Terry Bergeson from The Boeing Company, signed by Dick Spangler. The letter directed that the \$25,000 contribution “is being provided in support of the consulting services hired to help reorganize the office of the Superintendent of Public Instruction around the four Essential Academic Learning Requirements.” Those services were provided by Carkhuff Thinking Systems sometime before November 1997, most likely in June of 1997. My inspection of the documents relating to contract number 101-1 made me question the following:

1. Why is a contract signed in February 1998, rather than before the commencement date of July 1, 1997, and why are billings from Carkhuff Thinking Systems requesting payments “For Services Rendered During 1997, Total \$25,000” when a contract to perform services was not in place until February 1998?
2. Robert Carkhuff and the Assistant Attorney General Robert Patterson did not update the year on the signature page from 1997 to 1998, as the Deputy Superintendent Jim Coolican did. Why?
3. How could the dispute between the Boeing Corporation and the OSPI affect the late filing when services had already been rendered before the Boeing contribution /grant was received?
4. How could the OSPI and Boeing Corporation dispute the payment of a contract that had not been written?
5. What services were provided by Carkhuff Thinking Systems warranting a one time payment of \$25,000, when the only deliverables presented were several boards describing the Possibilities Schools ideas, and several of the boards were copyrighted in 2000?

Because of contract number 101-1’s questionable transactions, I made a request to inspect all contracts with Carkhuff Thinking Systems, and all documents and deliverables associated to the contracts. Two other contracts were provided for inspection as noted above the contract numbers are 102A-2 and 120-486.

I began inspecting the numerous books provided as deliverables of contract number 120-486, and was stunned to read the following passages from *The New Science of Possibilities*, authored by Robert Carkhuff and Bernard Berenson:

God is The Great Montessori Teacher: He co-processes only with those of us who use His most precious gift—the intellect with which He has endowed us.

We came to know God only when we came to generate human and phenomenal possibilities, for God is in the phenomena He presents to us. It is only when we begin to employ the plural pronoun “we” that we know that we are approaching collaboration with God: first relating interpersonally with our fellow collaborators; then processing interdependently with our phenomenal universes; perhaps only then co-processing with God.

These passages alone caused me to question the teachings of Robert Carkhuff, and ask myself why books are being purchased by the State of Washington that discusses the co-processing with God. I soon realized that the State of Washington purchased nearly \$75,000 worth of Robert Carkhuff publications for distribution throughout the five States involved with the LINKS Project grants. The books, *The New Science of Possibilities*, *Possibilities Schools* and *Human Possibilities* were distributed at five State conferences. Dr. Shirley McCune authorized payment for the purchases from Robert Carkhuff's publishing company, Human Resource Development (HRD Press). I was concerned about this due to the fact that the books directed how to communicate with God and what steps are needed to achieve the co-processing with God. I also noticed a potential conflict of interest issue in relation to Dr. Shirley McCune; she and Robert Carkhuff co-authored the *Possibilities Schools*.

On October 31, 2003, I spoke directly with Dr. Shirley McCune. During our telephone conversation I expressed several of my concerns, specifically the numerous references to God in Carkhuff's book, *The New Science of Possibilities*, and the integrated religious ideas in the fables available on LINKS website. I told Dr. McCune that she needed to stop promoting her New Age Religious ideas in our schools; she responded by informing me that she considered her religion as being Metaphysical. She furthered her response by informing me that the materials were carefully edited to ensure that no religious ideas were incorporated. She also stressed that neither her nor Andy Griffin have received a monetary benefit from Robert Carkhuff as a result of their co-authoring books with Robert Carkhuff and others at HRD Press. Dr. McCune shared that Carkhuff asked if he could put her name on the book as a co-author; she gave her permission for him to do so.

On November 3, 2003, I returned to the OSPI and continued inspecting documents. Before leaving, I requested to borrow several of the Carkhuff books. When I returned on November 4, 2003, all the books had been removed. I was provided with a written response from Dr. McCune in which she stated the following:

The books Ms. Vernon wishes to borrow were mistakenly taken from my personal library. They were not part of the LINKS project or any other OSPI business. Therefore, they have no relationship to any work that Ms. Vernon is reviewing.

In response to Dr. McCune's note I informed Dr. Bergeson per letter, dated November 7, 2003, of the following:

Dr. McCune is mistaken, please see the Carkhuff March 5, 2001, billing statement page 11, in which is listed the following:

26. Products for the LINKS Office		
Books:	(Copies x Cost)	
Possibilities Schools	400 x no charge	
Possibilities Parent	100 x 12.00	1,200.00
New Science of Possibilities: Volume I	20 x 23.96	479.20

New Science of Possibilities: Volume II	20 x 23.96	479.20
Possibilities Organization	20 x 23.96	479.20
Possibilities Leader	20 x 23.96	479.20
Human Possibilities	40 x 23.96	958.40
Art of Helping (text)	100 x 27.96	2,796.00
Art of Helping (workbook)	20 x 11.96	239.20
Art of Helping (trainer's guide)	20 x 23.96	479.20
Shipping		250.09
		<hr/>
	Total	7,839.69

Dr. McCune approved payment for the grand total amount of \$134,822, which includes the \$7839.69 purchase of the above books.

When I returned to the OSPI on November 10, 2003, only three books were provided for inspection: *Possibilities Schools*, *The New Science of Possibilities* and *Human Possibilities*.

In the November 4, 2003, letter from Dr. McCune, she also responded to a recent public disclosure request I made to receive all documents associated to HRD Press. Dr. McCune replied, "There are no documents related to HRD Press because our work was with Carkhuff Associates." However, shortly after I received five separate field orders for HRD Press purchases proving the purchase of nearly \$75,000 worth of HRD Press publications. I then addressed a letter to the Attorney General Christine Gregoire, Governor Gary Locke and Dr. Bergeson on December 1, 2003 discussing several concerns regarding the receipt of public documents. In the letter I informed them of the HRD Press documents in the following way:

My request for all HRD Press documents on October 27, 2003, was followed by a letter from Shirley McCune stating, "*There are no documents related to HRD Press because our work was with Carkhuff Associates.*" Soon after, I received five separate field orders and purchase orders for HRD Press products. Each order was for the amount of \$14,961, equaling \$74,805. The purchase orders had Shirley McCune's signature in the "approved by" section. The products are titled *Possibilities Schools*, *New Science of Possibilities*, and *Human Possibilities*. Robert Carkhuff is author of all three books; however, Shirley McCune is a co-author of the *Possibilities School*. Each order's quantity: 1000 of *Possibilities Schools*, 100 of *New Science of Possibilities*, and 200 of *Human Possibilities*. So in all, 5000 *Possibilities Schools* were purchased, 500 *New Science of Possibilities* were purchased, and 1000 *Human Possibilities* were purchased directly from HRD Press, and billed to Shirley McCune at the OSPI.

Dr. McCune also informed me in the letter dated November 10, 2003 that I have been provided, "the grants proposals and award materials for LINKS..." This is a key statement due to the fact Dr. McCune has not made available the first grant proposal, *Linking Educational Reform and Educational Technology*, submitted in 1998. Not until mid February am I provided with a copy of the 1998 grant proposal, and not until after I

address the concealment in a letter dated February 17, 2004. The concealment of documents and unnecessary delay in receiving requested documents is ongoing. This type of harassment and intimidation resulted in further maltreatment due to my continued documentation of each situation, and has escalated to the point I have requested an off site facility to continue inspecting public documents.

The week of October 20, 2003, was when I began reading the documents associated to Carkhuff's contract, and noticed that the awarding of contract number 120-486 was based on a competitive bidding process. There were two bids received: Carkhuff Thinking Systems and Inner Path. I asked Ms. Lynn Hallock, Public Disclosure officer, for the other proposal and evaluation results. Ms. Jackie Hansman, Dr. McCune's secretary, informed Ms. Hallock that there were no other bidders. I then explained to both Ms. Hallock and Ms. Hansman that the sole source justification letter submitted to the Office of Financial Management stated that there was another bidder listed with the name Inner Path. Both ladies appeared confused.

I returned to the agency on October 27, 2003, and was provided a document signed by Dr. McCune on October 27, 2003. Dr. McCune stated the following:

The RFP advertised in April of 2000 was responded to by Carkhuff & Inner Path. The proposals were reviewed by: Dr. Lee Mahon, Fielding Institute, San Francisco, CA; Dr. Jessel Koyioski, (deceased) Superintendent, San Francisco area; Dr. Lee Drogemeuler, Former CCSSO—Kansas, Professor South Florida University, Pensacola, Fla. The Contract was awarded to Carkhuff Thinking Systems. Due to limited storage space the proposal by Inner Path was destroyed after a 2 year period.

The destruction of public documents and the many inconsistencies relating to the Carkhuff contracts led me to believe that the agency was attempting to conceal documents related to the LINKS Project grants. This motivated me to thoroughly inspect the publications produced by Robert Carkhuff. The first week of November 2003 is when I began making copies of the many booklets provided in the Possibilities Schools series. While shuffling through the documents I came across a yellow notepad, I had noticed it before but did not read its content. However, this time I read the many pages of notes. The top five pages discussed "Test [WASL] Score Improvement." I continued to shuffle through the notepad, and found 14 pages of notes discussing the building of a Temple. This section was titled "Temple Messages." I sat very quietly, next to the Carkhuff deliverables boxes on the floor in the conference room, and read all fourteen pages. It was at that moment I realized I had discovered something far more serious than the OSPI's noncompliance with contract management policies. What was written is terrifying; some of what I read is as follows:

Purpose:

1. A Tribute to God, the Creator of All.

2. A Tribute to humankind, & reflect the paths and accomplishments of humans throughout the ages.
3. Stabilizing [Earth's] force to assure that the planet will not shift on its axis.
4. Interdimensional communication center to allow Earth to communicate with other celestial bodies.
5. Transformation chamber to transform the physical bodies of initiates who are ready to journey onto higher commands.

Further along it is noted that the “Temple [is] on the drawing board for 2000 years—sequel to the Pyramid structure.” The twelve roles of the Temple are described as the following:

1. Seer—work to integrate the higher thought & values into the structure of the Fifth Dimension
2. Wise—commitment & strength
3. Feminine role—strength of the yin for stability
4. Masculine role—strength and weakness of the yang energy—carries the weight of humanity's struggle for the deliverance of the Temple to the Earth.
5. Artistic—vibration of the frequency beyond the spectrum of the rainbow & brings this insight into the design of the Temple's structure.
6. Laborer—strives to find the keys to Fifth Kingdom & provide [Council with] new insights.
7. Thrifty—qualities of stability & strength
8. Eccentric—design for the inner structure
9. Producer—wayshouser for the many.
10. Introspective—learn the secret keys & codes to unlock the mysteries that made Atlantes great.
11. Law Givers—wisdom & strength while adhering to the laws of Oneness [the Divine]
12. Divine—bring gifts and wisdom from the Ascended Masters to Council members.

The document gives calculations and descriptive architectural notations of the Temple. A discussion is presented in relation to the “Transformation of individuals—guided by Isis—allow for molecules diffusion.” It is discussed that “Only mathematical proportional frequency that is destined to resonate in all is that of the triune. Triune is analogous to the Trinity; Key to understanding the release to Higher Worlds & Transmissions; Temple must be built with Triune structure on the outside.” A more detailed account of the Triune is provided as follows:

Triune vibration will bring the resonance of the electromagnetic force field around the Temple, Triune—mathematically provides portal for Transmissions. Spiritually, enhances the Transformation process of the individual with the Higher Self.

Chambers stabilize the electromagnetic currents produced by the pyramid. Lower chambers will stabilize the circular flow of the magnetic flux. Currents move in a

clockwise...as they approach ground level—reverse themselves when they reach The Divider line. Four underground passageways—lead to control room—must be built in a desert area. As human form transforms into the Light body it takes on new forms that are perceived only in the higher dimensions.

After reading the notes, I informed Ms. Hallock of the contents and expressed my concerns. Ms. Hallock appeared concerned, but was hesitant to discuss the contents. I shared with her that I was concerned to as why the notes were presented as deliverables of the Carkhuff contract. She expressed that they were mistakenly presented as public documents. Regardless of Ms. Hallock's opinion, I made copies of all the notes. When I returned the following Monday the notes were gone, and Ms. Hallock admitted to removing the notes and returning them to Dr. McCune's office. I then believed it necessary to address in a letter the contents of the notes and the removal.

On November 17, 2003, I addressed a letter to Attorney General Christine Gregoire, Governor Gary Locke, and Dr. Bergeson; the letter informed them of the Temple Messages and Ms. Hallock's removal of the notes. The only response received as a result of my letter was from Dr. McCune on November 18, 2003. Dr. McCune responded in the following way:

In response to your most recent letter dated November 17, 2003, I wish to reiterate that the documents you refer to are private notes unrelated to the OSPI business that were mistakenly placed in a box of LINKS project deliverables you requested to inspect. These notes are not deliverables but personal notes this is why they were removed from the box of LINKS project deliverables you requested to inspect. OSPI is not contributing funds to the building of a temple or promoting any form of religion within the public school system, nor does the agency have any plans to do so.

At this point I believed it necessary to read the book *The New Science of Possibilities*. While I was at the agency inspecting documents I decided to read more from the book, in doing so, I discovered that chapter six was about the State of Washington; this is when I realized that Dr. Bergeson, Dr. McCune and Dr. Griffin were directly involved with the development of Possibilities Schools. It is footnoted in the book *The New Science of Possibilities*, on page 232, the following:

The design team was composed of Superintendent Terry Bergeson, D.ED., and staff members Andrew Griffin, D.Ed., and Shirley McCune, Ph.D., consultation was provided by Don Benoit, M.A., Susan Mackler, M.A., of Carkhuff Thinking Systems.

My further readings of Carkhuff's books, the Temple notes, the LINKS Project's fables, and conversations with Shirley McCune concerned me greatly. I decided to purchase several of the books authored by Carkhuff, Griffin and McCune. I believed it necessary to purchase *The New Science of Possibilities*, *Possibilities Schools*, *Possibilities Mind*

and *The Light Shall Set You Free*. I also believed it necessary to purchase copies of the books produced from the Carkhuff Thinking Systems contracts.

When I spoke with Dr. McCune on October 31, 2003, I asked her how I could purchase the products produced from the grants. She informed me that the books were not for sale at that time. Not trusting Dr. McCune’s answer, I decided to search the web, and found listed on the Possibilities Schools website, <http://www.possibilitiesschools.com/products.html> , the following listing of books related to the Possibilities Schools series:

### Other books in The Possibilities Series™

Senior Author	Title	Print Copy	E-Book
D.N. Aspy	<a href="#">The Future of Education</a>	\$15.00	\$15.00
D.M. Benoit	<a href="#">The Possibilities Learner I: Thinking with Sentences</a>	\$12.50	\$12.50
D.M. Benoit	<a href="#">The Possibilities Learner II: Thinking with Systems</a>	\$12.50	\$12.50
R.R. Carkhuff	<a href="#">The Possibilities Schools: A Blueprint for Education in the 21st Century</a>	\$20.00	\$20.00
R.R. Carkhuff	<a href="#">The Art of Possibilities Teaching</a>	\$20.00	\$20.00
R.R. Carkhuff	<a href="#">The Possibilities Teacher</a>	\$25.00	\$25.00
R.R. Carkhuff	<a href="#">The Possibilities Leader</a>	\$20.00	\$20.00
A.H. Griffin	<a href="#">The Possibilities Parent</a>	\$15.00	\$15.00
A.H. Griffin	<a href="#">The Possibilities People</a>	\$10.00	FREE

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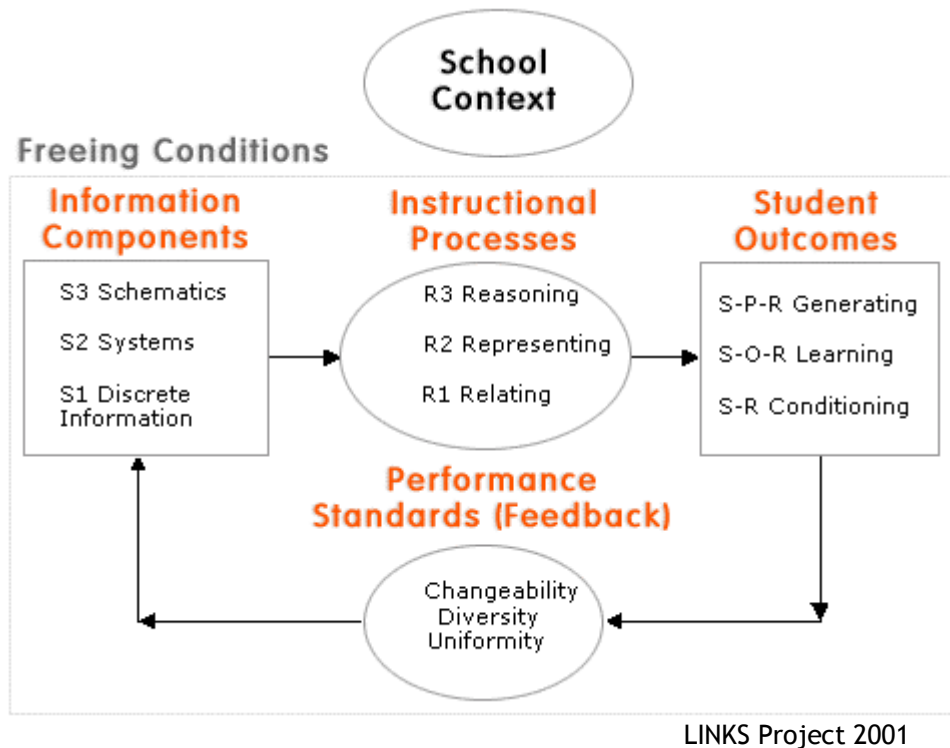
At this point, I decided to start reading the grants and contracts more thoroughly. The first grant I read in its entirety was titled “Possibilities Schools: Linking Educational Reform with Educational Technology.” The OSPI was awarded 2.7 million dollars by the U.S. Department of Education. Dr. Bergeson is listed as the Project Director and Dr. Shirley McCune is listed as the Project Manager. The diagram on page 21 of the grant

proposal also listed Carkhuff Thinking Systems, Dr. Robert Carkhuff as part of the Project Management team.

On page 4 the grant proposal discusses the Developmental Process, specifically it reads as follows:

The development of Possibilities Schools began with a systems-design for the future of American education. The system descriptions define the operations of education: the functions or outputs, components or inputs, the processes for transforming inputs into outputs, the conditions or contexts within which these processes take place, and the standards by which these processes are evaluated. These are operations that define all phenomena in living, learning and working circumstances; they apply to education.

On page 5 a diagram of the Possibilities Schools system model is provided; this diagram is also provided on the OSPI’s website (April 2004), the diagram is presented as follows:



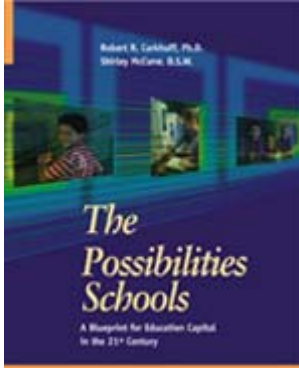
A detailed discussion about Components, Processes, Outcomes and Feedback is presented in Part I of this four part series.

Appendix B titled “LINKS Product Development,” of the Possibilities Schools grant proposal lists many of the products produced with the grant monies, below are some of

the products listed, these were produced from the first two LINKS Project grant monies contracting with Carkhuff Thinking Systems to produce the books.

### The Possibilities Schools

A first draft of Possibilities Schools is a blueprint for the development of educational capital in the 21<sup>st</sup> century. This book outlines the characteristics of probabilities schools which predominate today and possibilities schools which point the way to schools for tomorrow. The components of where we need to go are outlined.



**Print Copy \$20.00**

**E-Book (PDF) \$20.00**

## **The Possibilities Schools: A Blueprint for Education Capital**

by Robert R. Carkhuff, Ph.D. and Shirley McCune, D.S.W.

2001, Possibilities Publishing, Amherst, MA 01002.

A demystifying educational experience. Finally, schools are explained as systems. We learn about:

- Learners Outputs or what the learners need to be able to know and do,
- Curriculum Inputs or different kinds of information that can stimulate learner development,
- Instructional Processes or The New 3Rs the teachers employ to help learning,
- Learning Assessments or how learner performance can be measured,
- Learning Contexts or conditions that support the teaching/learning process.

The book is an elegant and simple overview of education and a profoundly useful explanation of what schools are now and can become.

### **Contents:**

#### **I. Introduction and Overview**

1. Probabilities Schools
2. The Possibilities Schools

#### **II. The Possibilities Curricula**

3. The Learner Functions — Generative Thinking
4. The Information Components — Stimulus Information
5. The Instructional Processes — The New 3Rs
6. The Organizational Conditions — Freeing Organizations
7. The Performance Standards — Changeable Measurements

#### **III. Summary and Transition**

8. The Possibilities Education

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### The Super Vision

Policy for Possibilities Schools calls for a new perspective and organizational conditions. The Super-Vision outlines Relating, Empowering and Freeing as the primary conditions needed for Possibilities Schools.

### The Possibilities Principal—The PrinciPAL Processes

This booklet outlines the primary functions of a principal in the Possibilities Schools—the functioning of Processing, Aligning and Leading.

### The Possibilities Parent

The Possibilities Parent is the first teacher and must remain the teacher that supports all students learning.



### **The New Possibilities Parent**

by Andrew H. Griffin, D.Ed.

2001, Possibilities Publishing, Amherst, MA 01002.

Our children need us. They need us to relate with them to show them we understand what is important to them. They need us to help them rate their current performances so they can learn to measure and nurture their own goals. We need to reward our children to encourage all their healthy and growthful choices. The Possibilities Parent shows us how.

**Print Copy \$15.00**

**E-Book (PDF) \$15.00**

### **Contents:**

1. The New 3Rs of Parenting
2. R<sup>1</sup> — Relating Skills
3. R<sup>2</sup> — Rating Skills
4. R<sup>3</sup> — Rewarding Skills
5. The Possibilities Parent

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Possibilities Schools website (April 2004)

Possibilities Learning: The Possibilities Teaching and Learning System

The booklet provides a perspective of Possibilities Schools from the perspective of the learner.

The Possibilities Schools grant served to develop “training modules for teachers and principals.” These modules are considered training tools for implementing the Possibilities Schools program. Each area of expertise was provided with a Skills-Kit that concentrated on the specific duties of each professional role: Possibilities Teacher, Principal, Leader, Learner and Parent. Carkhuff was the contractor directed to produce the Skills-Kits.

After I realized that several of the books were authored by OSPI employees I decided to concentrate on the contracts awarded Carkhuff Thinking Systems. I began reading through both contracts, number 102A-2 and 120-486, and noticed a number of questionable activities relating to contract billings and payments, bidding practices, product delivery, and compliance with contractual agreements; listed below is a detailed description of the activities in question:

### **Contract Number 102A-2: \$400,000**

The contract was signed for final approval on October 1, 1998 by Assistant Superintendent Mike Bigelow. Robert Carkhuff signed the contract on September 29, 1998. The work period was from October 1, 1998 to September 30, 2000. The contract was a sole source contract, and was not filed with the Office of Financial Management (OFM); it is noted on the “Record of Contract” document, “Collaboration research & development contract contractor named in funding & subsequent grant. No filing required OFM 4.3.1.1.4.e.” The sole source justification letter identified Carkhuff Thinking Systems’ personnel “as the strongest work on skills for twenty-first century and process-based education.” The justification letter supports this claim by stating that “a collaborative research and development proposal was developed with OSPI, ESD 101, and Carkhuff Thinking Systems and submitted to the Fund for the Improvement of Education, U.S. Department of Education, as a field-initiated project.”

After reviewing the grant proposal for R215R980003—*Linking educational Reform and Educational Technology*—August 1998 to August 2000—\$5million, I noticed that Carkhuff Thinking Systems was noted in the budget section to receive \$400,000 during a two year period. However, the proposal does not give any direction or description regarding the work to be performed by Carkhuff Thinking Systems. A mere mention in the budget section under *Identified Subcontractors* is the only reference to Carkhuff Thinking Systems. In fact, the section describing the identified subcontractors does not even address Carkhuff Thinking Systems; consequently, the grant proposal does not offer any explanation or description of the work to be performed by Carkhuff Thinking Systems. Furthermore, there is no resume pertaining to Robert Carkhuff in either the grant proposal or contract documents. However, the sole source justification letter filed with contract number 102A-2 states, “Carkhuff Thinking Systems is to provide development of the student and teacher products. ESD 101 will do the production, and OSPI will manage and coordinate the effort with other project activities.” Neither the U.S Department of Education nor the OSPI make note of the fact Carkhuff Thinking Systems does not present sufficient evidence demonstrating the company’s and its staffs’

qualifications to develop student and teacher products. Ultimately, Carkhuff Thinking Systems creates a new educational system's design for the State of Washington's public schools.

### **Commission on Student Learning and Carkhuff**

It is important to briefly discuss Dr. Robert Carkhuff's involvement with the Commission on Student Learning (CSL). Documents found during the public inspection of CSL records support the fact that Dr. Robert Carkhuff had a consulting role during the design phase of the frameworks for the Washington State Essential Academic Learning Requirements.

When acting as the Executive Director of the Commission on Student Learning, Dr. Bergeson consulted directly with Robert Carkhuff; this is noted in the January 23, 1998 letter, which references contract number 101-1. Assistant Superintendent Mike Bigelow stated, "Carkhuff[s] conceptual framework and materials were used by the state's Commission on Student Learning to plan and implement education reform." Also, in January 1994 Dr. Bergeson addresses a letter to Robert Carkhuff, she writes the following:

"Dear Bob:

Thanks for helping. I need your assessment of the "essential" nature of these essential learnings. In addition to the report, I have enclosed a step chart of our overall task from now until the year 2000, one of our immediate tasks on Goal I, Math, and the actual goals charged by the Commission.

I need help in pulling these foundation skill areas together in a powerful way. Pages 7-10 are my first attempt—which also were modified by our committees.

I'll call to discuss this. Thanks!"

These two letters clearly demonstrate Carkhuff's involvement in designing the frameworks for the Essential Academic Learning Requirements (EALR). The CSL documents also included a dozen or more visual graphics of Carkhuff's "Phases of Intrapersonal Processing" system design; these visual graphics were used for teacher trainings.

I am confident that Dr. Bergeson was well indoctrinated with Carkhuff's teachings when acting as the Executive Director of the Commission, and used existing frameworks and transformed the process to reach hers and others' end goals of making a Paradigm Shift in the curriculum and the teaching delivery skills of educators. This Paradigm Shift agenda is presented in the CSL documents. Specifically, the documents describe the Paradigm Shift as "It is not what the teacher does, but rather, what the learner knows and is able to do as a result of the learning environment that the teacher creates. We will articulate what our learners will be able to do; and we will make clear the role and responsibility of the learner, parent, and community—as well as our role." This idea is commonly presented to the public by Dr. Bergeson as teaching to the 'learner's frame of reference.' This concept drives the education reform (changing the delivery and content of the curriculum) in Washington State.

The ideas presented to educators in 1995 were more fully integrated into our public schools once Dr. Bergeson was elected in 1997 to act as the State Superintendent. Carkhuff's idea of Intrapersonal Processing was developed thirty years ago, and the state of Washington by way of the LINKS Project grant funds served to re-package his ideas, and present it in a new way: "Possibilities Schools" and "The New 3Rs: Relating, Representing and Reasoning." Part III of this four part series will provide a more in-depth account of Robert Carkhuff's background and writings.

### **Billings of and Payments to Carkhuff Thinking Systems**

The contract between the OSPI and Carkhuff Thinking Systems (CTS) required CTS to provide “A yearly plan for the development of the products including procedures for collaboration with ESD 101 and Superintendent which shall be subject to the prior approval of the Superintendent’s designee for content, timelines, and the quantity and quality of proposed deliverables.” If a yearly plan was developed for the year 1998-1999, it has not been made available for public inspection.

The contract outlined a payment plan; the plan was written in the following way:

1. October 1, 1998, for the delivery of consultation services, plans, and procedures for the development of specified products not to exceed \$50,000.
2. January 1, 1999, for the delivery of products outlined in the yearly plan not to exceed \$50,000.
3. April 1, 1999, for the delivery of products outlined in the yearly plan not to exceed \$50,000.
4. July 1, 1999, for the delivery of products outlined in the yearly plan not to exceed \$50,000.
5. The use of the same payment schedule for 1998-1999 for the year 1999-2000.

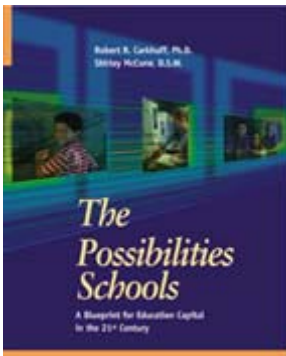
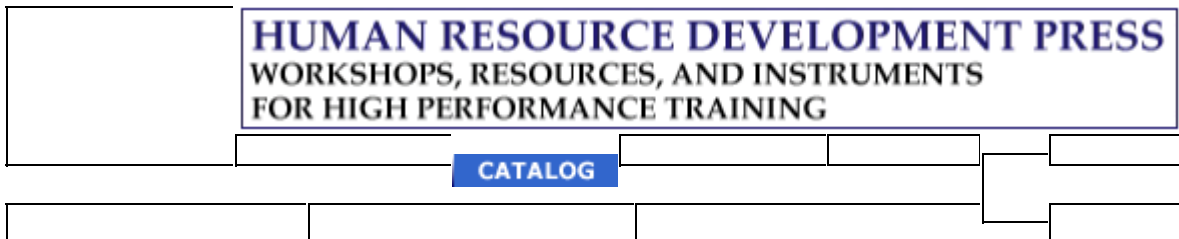
The first payment of \$50,000 was paid by the OSPI on October 26, 1998, without any documentation submitted by Carkhuff Thinking Systems to support what services were rendered or products delivered. The billing statement is dated October 6, 1998, which is only six days after the contract began. CTS was paid \$200,000 for the first year, even though, a yearly plan does not exist, and no clear understanding of what products were to be produced, the timelines for delivery or the quantity.

On May 7, 2004, I requested to receive the yearly plans referenced in contract 102A-2 without realizing I had the yearly plan 1999-2000. On May 14, 2004, the OSPI responded in a letter that “We have reviewed the files and talked with staff regarding the location of yearly plans. There is nothing we can identify as a yearly plan.”

Not until October 26, 1999, is there a yearly plan presented; there are two plans presented for the same year, however, they are slightly different. Both plans discuss the production of four books in March 2000 (MCH): *New 3Rs*, *Possibilities Schools*, *Possibilities Community* and *Possibilities Teacher*. One plan indicates that the books are a “HRD Press Project.” However, it is clarified in the other plan that during October 1999 through December 1999 the activity is “Write and edit 4 Books (see MCH)” and in January 2000 it is written “Send 4 books (see MCH) to printer.” With this clarification of when the books were written and printed it is clear that *Possibilities Schools*, which is sold by HRD Press, published by Possibilities Publishing, copyrighted by Robert Carkhuff and authored by Shirley McCune and Robert Carkhuff, is a product of the contract, therefore the property of the State of Washington. Other books written and produced under contract number 102A-2 are sold by Robert Carkhuff, copyrighted by Robert Carkhuff, and some are even labeled LINKS Project, however, sold by HRD Press/Possibilities Publishing.

Carkhuff Thinking Systems' billing statement for work accomplished October 27, to December 16, 1999 requests payment for the design of *Possibilities Schools* at 13 days for a sum of \$7,500 for Robert Carkhuff, and 4 days for the sum of \$2,500 for Don Benoit. Even though, the State of Washington funded the production of the book *Possibilities Schools* it is sold by HRD Press (see website information below) and its sister company, Possibilities Publishing as noted on page 11 of this report.

(HRD Press April 2004)



## The Possibilities Schools

**A Blueprint for Education Capital in the 21st Century**

Robert R. Carkhuff, Ph.D. , Shirley McCune D.S.W.

**Price: \$ 25.00**

Add to Cart

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"... milestone in the evolution of humanity."

- D. N. Aspy, University of Oklahoma

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The application of The New Science of Possibilities to 21st century educational operations outputs, inputs, processes, contexts, assessments.

### Contents:

1. Probabilities Schools
2. The Possibilities Schools
3. The Learner Functions - Generative Thinking
4. The Information Components - Stimulus Information
5. The Instructional Process - The New 3Rs
6. The Organizational Conditions - Freeing Organizations
7. The Performance Standards - Changeable Measurements

## 8. The Possibilities Education

HRD Press May 2004

Robert Carkhuff also sells the *Possibilities Teacher* and *Possibilities Learner I and II* through HRD Press's sister company Possibilities Publishing. Possibilities Learner I and II both have on the cover *LINKS Project*.



### **The New Possibilities Teacher**

by Robert R. Carkhuff, Ph.D. Andrew H. Griffin, D.Ed., Shirley McCune, D.S.W., and Donald M. Benoit, M.Ed.

2001, Possibilities Publishing, Amherst, MA 01002.

A systems view of the teaching and learning process. This text explains how teachers can become Possibilities Teachers, how learners can become Possibilities Learners, and how schools can become Possibilities Schools.

Print Copy \$25.00

E-Book (PDF) \$25.00

### **Contents:**

#### **Part I. What We Learn: The Outputs and Inputs of Learning**

1. The Teaching and Learning Processes
2. The Learner Outputs
3. The Information Inputs

#### **Part II. How We Learn: The New 3Rs of Instructional Processes**

4. R<sup>1</sup> — Relating to Information
5. R<sup>2</sup> — Representing Information
6. R<sup>3</sup> — Reasoning With Information

#### **Part III. How We Improve Learning: The Contexts and Assessments of Learning**

7. The Learning Contexts
8. The Learning Assessment

©2001, Carkhuff Thinking Systems, Inc

(Possibilities Schools April 2004)



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## **The New Possibilities Learner I: Thinking with Sentences**

by Donald M. Benoit, M.Ed., Robert R. Carkhuff, Ph.D., Andrew H. Griffin, D.Ed., and Shirley McCune, D.SW.

2001, Possibilities Publishing, Amherst, MA 01002..

This Possibilities Learner book explains skills our kids need to empower their generativity and creativity. **The New 3Rs** skills are all about processing or thinking with information:

**Print Copy \$12.50**

**E-Book (PDF) \$12.50**

- Relating in order to represent,
- Representing in order to reason, and
- Reasoning in order to generate new images of information.

*In this book, readers learn about **The New 3Rs** skills for "**Thinking with Sentences.**"*

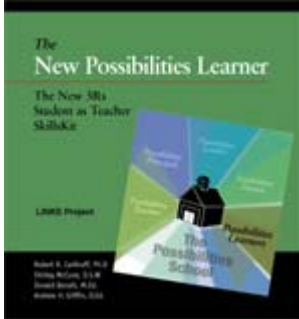
### **Contents:**

#### **Chapters:**

1. What's Up?!-Relating to Information
2. What It Is?!-Representing Information
3. What Else?!-Reasoning by Expanding
4. What's Best?!-Reasoning by Narrowing
5. What's Next?!-Reasoning by Doing
6. Summary: The New 3Rs

©2001, Carkhuff Thinking Systems, Inc

(Possibilities Schools April 2004)



## **The New Possibilities Learner II: Thinking with Systems**

by Donald M. Benoit, M.Ed., Robert R. Carkhuff, Ph.D., Andrew H. Griffin, D.Ed., and Shirley McCune, D.SW.

2001, Possibilities Publishing, Amherst, MA 01002.

This Possibilities Learner book explains skills our kids need to empower their generativity and creativity. The New 3Rs skills are all about processing or thinking with information:

**Print Copy \$12.50**

**E-Book (PDF) \$12.50**

- Relating in order to represent,
- Representing in order to reason, and
- Reasoning in order to generate new images of information.

In this book, readers learn about The New 3Rs skills for "Thinking with Systems."

### **Contents:**

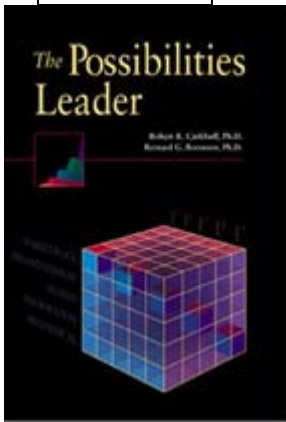
#### **Chapters:**

1. What's Up?!—Relating to Information
2. What It Is?!—Representing Information
3. What Else?!—Reasoning by Expanding
4. What's Best?!—Reasoning by Narrowing
5. What's Next?!—Reasoning by Doing
6. Summary: The New 3Rs

©2001, Carkhuff Thinking Systems, Inc.

(Possibilities Schools April 2004)

The book *Possibilities Leader* is also a product of Carkhuff Thinking Systems' contract with the OSPI. I purchased the book pictured on the Possibilities Schools product website; however, it is not as described. The book I purchased, and that is pictured on the website, is authored by Robert Carkhuff and Bernard Berenson. The book *Possibilities Leader* presented as a contract deliverable is a shortened version of the book for sale. The Possibilities Schools website advertises the book as being authored by Robert Carkhuff, Lee Droegemuller, Andrew Griffin and Shirley McCune. HRD Press sells the same book, however, Robert Carkhuff and Bernard Berenson are the only authors listed.



**The New Possibilities Leader**

by Robert R. Carkhuff, Ph.D., Lee Droegemuller, Ph.D., Andrew H. Griffin, D.Ed., and Shirley McCune, D.S.W.

2001 Possibilities Publishing, Amherst, MA 01002.

Presents the responsibilities of a Possibilities Leader: the empowerment of the possibilities organization, the actualization of possibilities people, and the delivery of the possibilities schools. Also presents the enabling New 3Rs skills for leaders: relating, representing and reasoning.

**Contents:**

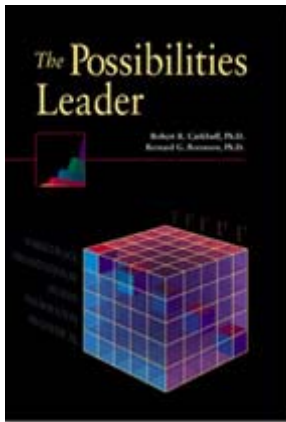
**Print Copy \$20.00**

**E-Book (PDF) \$20.00**

1. The Possibilities Leader
2. R<sup>1</sup> — Relating
3. R<sup>2</sup> — Representing
4. R<sup>3</sup> — Reasoning
5. Organizational Possibilities
6. Human Possibilities
7. Information Possibilities
8. The New Possibilities Leader

©2001, Carkhuff Thinking Systems, Inc.

(Possibilities Schools April 2004)



## The Possibilities Leader

**The New Science of Possibilities Management**

Robert R. Carkhuff, Ph.D. , Bernard G. Berenson, Ph.D.

**Price: \$ 29.95**

Add to Cart

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“ . . . the first real management paradigm; the first true model that defines all of the processing systems required by the 21st century manager.”

- Barry Cohen

Parametric Technology Corporation

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The leader as the repository of processing skills—I<sup>1</sup>, I<sup>2</sup>, I<sup>3</sup>, I<sup>4</sup>, I<sup>5</sup>.

### Contents

1. Possibilities Management—The Processing Paradigm
2. I<sup>1</sup>—Information Relating Systems
3. I<sup>2</sup>—Information Representing Systems
4. I<sup>3</sup>—Individual Processing Systems
5. I<sup>4</sup>—Interpersonal Processing Systems
6. I<sup>5</sup>—Interdependent Processing Systems
7. Process-Centric Change

### **Product Ownership**

On December 8, 2003, I contacted HRD Press/Possibilities Publishing per telephone 1-800-822-2801, and spoke with a salesperson. She informed me that I could purchase *Possibilities Teacher* for \$17.95 and *Possibilities Leader* for \$29.95. On January 30, 2004, I contacted HRD Press again and spoke with Robert Carkhuff Jr. He said I could purchase *Possibilities Teacher* for \$17.95, *Possibilities Leader* for \$29.95, *Possibilities Learner I and II* for \$29.95 each, or \$54.95 for both, and *Possibilities Schools* for \$25.00. I ask him if I could purchase all the books for a package deal; he said if I emailed him at [rw@hrdpress.com](mailto:rw@hrdpress.com) he would give me a package price.

Realizing that there may be a copyright infringement issue I decided to read the general provisions attached to contract number 102A-2. Carkhuff Thinking Systems' president Robert Carkhuff signed contract number 102A-2, documenting his agreement to all contractual requirements outlined, which does include the attached general provisions. The provisions specified in Section III: Incorporation of General Provisions, "This contract includes and incorporates as is fully set forth herein the GENERAL PROVISIONS which are marked 'Attachment A: To Personal Services Contracts' and attached hereto." Attachment A: Section III, specifically stated the following:

**Ownership of Work Products and Other Personal Property, And Real Property.** Data which originates from this contract shall be "works for hire" as defined by the U.S. Copyrighted Act of 1976 and shall be owned by the Superintendent. Data shall include, but not be limited to, reports, documents, pamphlets, articles, books, magazines, surveys, studies, computer programs, films, tapes, and/or sound reproductions. Ownership includes ownership of all intellectual concepts and properties embodied in data, the right to copyright, patent or register data, and the right to transfer ownership of data.

### **Product Delivery and Cost Incurred**

The billing statements were to be presented as mentioned above in quarterly billings; this is not how the billings were presented. The billings were submitted to the OSPI in the following order:

- October 6, 1998
- April 1, 1999
- June 9, 1999
- July 12, 1999
- October 17, 1999
- December 4, 1999
- January 30, 2000
- February 23, 2000

The billings do not provide a clear accounting of the true expenses incurred. There are many questions about products delivered, and cost submitted. For example, the work spent on developing the overview video was billed in the following way:

#### **Overview Video**

Don Benoit: 20 days at \$500 a day (\$10,000).  
Robert Carkhuff: 7 days at \$500 a day (\$3,500).  
Susan Mackler: 5 days at \$500 a day (\$2,500).

EP Visual Design Inc: \$3500  
Video Graphics (Revisions): \$1,900

### **Overview Video Script**

Don Benoit: 1 day at \$500 a day (\$500).

### **Overview Booklet**

Don Benoit: 15.5 days at \$500 a day (\$7,750).  
Robert Carkhuff: 2 days at \$500 a day (\$1,000).  
M. George—Editorial Services: \$375  
EP Visual Design Inc: \$2,017.  
Printing: \$1,141  
Revisions: \$125

Three items were billed as completed with the cost of \$33,808; however when the items were requested for inspection the video was not provided. I received the booklet and the video script. When I inquired of the video, Dr. Shirley McCune stated in a letter dated February 17, 2004, “The Overview Video billing you cited on a Carkhuff bill covered the development of a lengthy script and the artistic rendering of illustrations. The script was never produced in a video because both ESD 101 and OSPI felt it was too complex and lengthy for an effective video.” The development of the overview products took place from January 1999 through May 1999. On May 7, 1999, Dr. Terry Bergeson had on her calendar “09:00 AM Hold for Video Filming.” The LINKS 1998-1999 evaluation report noted that “a videotaped presentation by State Superintendent Terry Bergeson on the new 3Rs is also in production.” This report was published in September 1999 in relation to the first year of grant number R215R980003.

Carkhuff Thinking Systems billed approximately \$130,000 for work in the area of “Module Development.” The modules were developed for the website; however nothing exists on the LINKS Project site or the Possibilities Schools site. The only item reviewed by an evaluator was *The New Possibilities Teacher: The New 3Rs SkillsKit*. The evaluation was dated March 1, 2001 – July 30, 2001. It was noted in the report that the “contract with Carkhuff Learning Systems was halted because they could not translate their concept of the ‘possibilities schools’ into training materials for educational practitioners.” The one item reviewed was noted as having a “tone and content [that] feel[s] flat and uninspiring.” The final grant, R303K010044—*Development of Mathematics and Science Web-Based Learning Resources for Middle and High School Teachers and Students*, suggests that the materials produced by Carkhuff Thinking Systems are online or ready for installation.

### **Evaluation Process**

Each grant awarded the LINKS Project was budgeted to have a program evaluation. The first grant, R215980003, had a program evaluation for the first year only. The grant proposal budgeted \$40,000 for year one and \$40,000 for year two. The OSPI does not have a contract with the Northwest Regional Educational Laboratory during the time the first year evaluation was completed by the Laboratory.

The second grant, R215R990023, evaluation was not presented; therefore, I am led to believe it does not exist. However, the grant proposal noted, “the use of a third party observer to document the project by maintaining the MS Project documentation record and the use of outside evaluators to evaluate the total project. Project documentation is budgeted at \$10,000 and a comprehensive evaluation subcontract is budgeted at \$50,000.” When I requested the MS Project documentation Dr. McCune responded in a letter dated February 17, 2004, “it is my understanding that the Washington documents which were held by Dr. Sarita Schotta were disposed of when she left OSPI employment in June, 2002.”

Grant number R303K000037 has two evaluation reports: one dated March 2001 – July 2001, and a second dated November 2001. The budgeted amount for evaluations was \$50,000.

Grant Number R303K010044 does not appear to have a second year evaluation report, and the first year report does not clearly state what grant is being evaluated. On February 17, 2004 Dr. McCune claimed she had provided me with “the latest, most comprehensive evaluation report of the LINKS grant.” The latest evaluation presented is dated July 2002. The final grant ended on July 2003. It was budgeted in the grant proposal \$80,000 a year for a total of \$160,000 to evaluate the grant; however, the LINKS Project expenditures disclosed only \$10,000 paid to the Northwest Regional Educational Laboratory, which was the named evaluator in the grant.

The final grant proposal noted in the evaluation section that “a key component of this project will be the use of an online management program that not only provides a tool for managing and monitoring but also a valuable communications tool for the varied groups working on the project. The Washington staff will manage this portion of the evaluation.” I have not been provided with any documents relating to the online managing and monitoring tool.

Three grants were awarded: C120-882, February 7, 2001, \$56,000; C23-0336, November 15, 2001, \$80,000; and C23-1118, June 6, 2003, \$10,000. Total amount paid was \$132,526; the total amount budgeted was \$350,000.

The first two evaluations published by the Northwest Regional Educational Laboratory briefly mention the Possibilities Schools products. The final two reports do not mention the products or Carkhuff Thinking Systems. Even the grant titled Possibilities Schools has an evaluation that does not give much input on what products were developed in relation to Carkhuff Thinking Systems. The evaluation reports discussing LINKS Project’s website do not address any of the products developed by Carkhuff Thinking Systems that were intended for use on the website. My review of the website concludes that the site does not contain any of the products developed by Carkhuff Thinking Systems—no modules, books, or videos.

### **Research Planning and Design**

Several of the billings items relate to research, planning and designing of Possibilities Schools products; the billing total is \$46,450. Two other billing items are listed as “Curriculum Mapping” and “Teaching Skills” with a cost of \$16,500. Aside from the repackaging cost, the developed products’ content did not require research, planning or designing due to the fact that the information provided already exists. My research into

Robert Carkhuff has uncovered two series of publications reflecting the same conceptualized teaching skills presented in the Possibilities Schools series. The following books have been published by HRD Press; these books are similar in content, and in some sections exactly the same with regard to the diagrams and ideas presented, in fact Dr. Bergeson and Andrew Griffin co-authored with Carkhuff two of the books:

### **The Skills of Teaching Series**

The Skills of Teaching: Interpersonal Skills: HRD Press, 1977.  
Robert Carkhuff, David Berenson, Richard Pierce

The Skills of Teaching: Content Development Skills: HRD Press, 1978.  
Robert Carkhuff, Sally Berenson, David Berenson

The Skills of Teaching: Teaching Delivery Skills: HRD Press, 1979.  
Robert Carkhuff, David Berenson, Sally Berenson

The Skilled Teacher: HRD Press, 1981.  
Robert Carkhuff, David Berenson

### **The Human Productivity Series**

Interpersonal Skills and Human Productivity: HRD Press, 1983.  
Robert Carkhuff

Sources of Human Productivity: HRD Press, 1984.  
Robert Carkhuff

Exemplar: HRD Press, 1984.  
Robert Carkhuff

Training Delivery Skills: Preparing the Training Delivery: HRD Press, 1984.  
Robert Carkhuff, Richard Pierce

The Productive Teacher I: An Introduction to Curriculum Development: HRD Press, 1984.  
Robert Carkhuff, Cheryl and David Aspy, David Berenson, **Terry Bergeson**, Karen Garr, **Andrew Griffin**

The Productive Teacher II: An Introduction to Instruction: HRD Press, 1984.  
Robert Carkhuff, Cheryl and David Aspy, David Berenson, **Terry Bergeson**, Karen Garr, **Andrew Griffin**

Human Processing and Human Productivity: HRD Press, 1986.  
Robert Carkhuff

### **Robert R. Carkhuff Credentials**

Robert Carkhuff presents himself as “One of the preeminent social scientist in history...one of the most-cited social scientist of our time according to the *Institute for Scientific Information*...is author of three of the 100 books most referenced by social scientists according to the *Institute for Scientific Information*.” Dr. Carkhuff’s resume submitted with grant proposal “Education for the 21<sup>st</sup> Century” is a one page advertisement. The one page resume does not provide evidence of educational background, employment history, nor does it provide evidence supporting Carkhuff’s proclamations of being the “most-cited” and “most referenced” social scientist.

The April 14, 2000, CTS proposal submitted to the OSPI merely mentions that Dr. Carkhuff has a Ph.D in Psychology from State University of New York. No previous education mentioned nor is there a date given of when he received his Ph.D. Other than Robert Carkhuff’s ownership of HRD Press, there is no employment history presented. Since 1971 Robert Carkhuff has published his own books.

### **Summer Institute Billing**

Carkhuff billed for, in his June 1999, July 1999 and October 1999 statements, the preparation for and delivery of summer institutes at \$9,173. Carkhuff was presumably under contract with the ESD 101 to perform duties in relation to the delivery of 5 Summer Institutes across the State of Washington. Specifically, it is noted in Carkhuff’s Progress Report for July 1, 1999 and August 29, 1999, that “at the request of the LINKS Project, CTS participated in these institutes by preparing and delivering a training presentation on The New 3Rs. Actual training delivery days and travel expenses were paid to CTS by a separate contract with ESD 101. Some content preparation costs were billed to the LINKS Project. Some travel related expenses, namely 5 nights in hotels between institute presentations were billed to the LINKS Project.” Aside from preparation and hotel expenses (\$7,173), Carkhuff billed \$5,000 for 9 and half days of Summer Institute delivery.

Carkhuff Thinking Systems was a subcontractor of the ESD 101 contract number 102A-1 awarded by the OSPI under LINKS Project grant monies. Carkhuff was the subcontractor identified to produce “videos and dubs and/or CD-ROMS and/or web based materials developed by Carkhuff and Associates...estimated cost is \$60,000.” The billings provided by the ESD 101 do not clearly state whether funds were dispersed to Carkhuff Thinking Systems. ESD 101 expenditure list “Skills for 21<sup>st</sup> Century” having a budget of \$50,000 on November 18, 1998, and a balance of \$50,000; this remains until January 1999, when the budget and balance change to \$60,000; this remains until May 1999, when the “Skills for 21<sup>st</sup> Century” budget and balance change to \$6,000. The documents do not reflect expenditures of \$54,000. It is as if the money just disappears. My request to receive for inspection the deliverables of the ESD 101 contract has not been honored by the OSPI. I have not been presented with any videos developed by Carkhuff or the ESD 101. The documents are confusing with regards to what services were rendered by CTS—meaning Carkhuff Thinking Systems’ Progress Reports claim he provided services in the area of consultation to the ESD 101 contract, but the ESD 101 contract agreement with the OSPI suggests he was to provide video tapes and web materials.

## **Travel Reimbursements**

Carkhuff Thinking Systems billed for reimbursements of two plane tickets costing \$2,060 each, one ticket at \$740, three hotel rooms for two nights each costing approximately \$210, a four night hotel stay costing \$448, random hotel stays for five nights costing \$673, rental car costing \$229, travel request, no specifics, costing \$242.75, air and ground travel costing \$440.32, lodging, and car travel and food expenses costing \$720.77. A total of \$7822 was requested for reimbursement; these reimbursements were approved for payment by Dr. Shirley McCune, without any receipts, ticket stubs, hotel bills requested or presented. When I requested to review the documents supporting travel reimbursement requests I was told Carkhuff did not have to provide receipts, and if I wanted I could make a request to Robert Carkhuff for those documents. Carkhuff Thinking Systems is required to keep records for six years after the contract end date.

## **ESD 101—Arizona State University—Math.ed.ology**

The ESD 101 subcontracted with the Arizona State University; it appears that the Arizona State University was to develop or provide a math curriculum called Math.ed.ology. It was noted in the Northwest Regional Educational Laboratory report, dated September 1999, that “Under the auspices of LINKS a contract was negotiated with the producers of Math.ed.ology which allows distribution and use of the software throughout the state, in CD-ROM or online formats.” Based on a letter, dated January 28, 1999, to the Arizona State University a licensing agreement was purchased with the ESD 101 contract funds. The cost of the license was \$300,000; this licensing agreement is renewed annually (two more times--\$600,000) until January 2002. OSPI contracted with the Arizona State University for the last two years of the licensing agreement. It is important to note that the Northwest Regional Educational Laboratory report dated March 1, 2001-July 30, 2001, stated the Math.ed.ology “training materials were conceptually sound, but in this case, they were better suited for pre-service rather than in-service.” During the contracted licensing time and after, the LINKS Project had separate contracts with the Arizona State University to develop reading LINKS lessons and middle school math LINKS lessons; the middle school math LINKS lessons are not currently online. Dr. McCune informed me per email on May 17, 2004 that the math program is disseminated on CDs rather than online.

There are conflicting dollar amounts between the actual dollar amounts on the contract documents and the amount reported spent on the LINKS grant summary of expenditures. Based on contractual agreements between the OSPI and the Arizona State University approximately 3.4 million dollars was contracted to the Arizona State University—this includes the two years of licensing agreements. The only product on the LINKS site is the reading LINKS.

## **Summary of Findings**

In summary, it does not appear that any substantial products have been produced with the Carkhuff Thinking Systems’ contract other than several books that are now being sold

under the copyright of Robert Carkhuff or under the HRD Press name. The ESD 101 contract does not give clear direction of what was actually produced from their contract nor have any of the products mentioned as being developed from the funds been provided for inspection. I am unclear of what the Arizona State University licensing agreement developed and provided for use; it was noted in the licensing agreements that the Arizona State University would develop certain products as part of the licensing agreement.

### **Contract Number 120-486: \$667,000**

On October 26, 1999, Dr. McCune received a letter from Carkhuff Thinking Systems requesting input on their detailed attached plan for implementation of the forthcoming RFP for a \$667,500 contract. The letter requested that Dr. McCune “advise [them] as to any modifications [she] think[s] are appropriate.” The letter also noted the following:

- The first plan is a one page table to present how we might best use the final \$100,000 of our current contract. The table is titled: *Detailed cost estimates for new 3Rs Kids Pilot...etc.*
- The second plan is a proposal for how CTS could respond to your request for development of WEB-materials. It titled: *The Possibilities Schools and The New 3Rs.*
- The third plan is an updated proposal for how CTS could respond to your request for the delivery of 5 conferences, one to each participating LINKS states. It’s titled: *State Conferences—The Possibilities Schools and The New 3Rs.*

Ultimately Carkhuff Thinking Systems was awarded the contract, after a competitive bidding process took place in April 2000. Upon review of the documents associated to Carkhuff Thinking Systems contract I realized that another proposal was received from a company named Inner Path; however, when I requested Inner Path’s proposal the OSPI informed me that the proposal and evaluation results had been destroyed. In fact, on October 27, 2003, Dr. McCune signed the following statement confirming the destruction of the proposal and I assume evaluation results, I mentioned this briefly on page 6 of this report:

The RFP advertised in April of 2000 was responded to by Carkhuff & Inner Path. The proposals were reviewed by: Dr. Lee Mahon, Fielding Institute, San Francisco, CA; Dr. Jessel Koyioski, (deceased) Superintendent, San Francisco area; **Dr. Lee Drogemeuler, Former CCSSO—Kansas**, Professor South Florida University, Pensacola, Fla. The Contract was awarded to Carkhuff Thinking Systems. Due to limited storage space the proposal by Inner Path was destroyed after a 2 year period.

The evaluator Dr. Lee Drogemeuler may have a conflict of interest due to the fact he is co-author with Carkhuff, McCune and Griffin of *The New Possibilities Leader*; this is noted on the Possibilities Schools website advertisement of the book, as presented on page 20 of this report.

The RFP No: 743, title: Web-Enhancement Materials for Possibilities Schools: LINKS Project, Proposal Due Date: April 17, 2000, required the submittal of a signed "Certification and Assurances" document. Robert Carkhuff signed the document on April 14, 2000, and presented it along with his proposal and letter of submittal on April 14, 2000. The document specifically certifies and assures the following:

In preparing this proposal, I/we have not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity.

As noted above the October 26, 1999, letter addressed to Shirley McCune provided a detailed proposal, and a request for advisement to "any modifications" she thought appropriate for the upcoming proposal. The October 26, 1999 plan is similar to the April 14, 2000, proposal submitted, in many areas it is exactly the same. Dr. McCune is the Principal Investigator of the LINKS Project and is listed in the RFP as the "RFP Coordinator."

### **Contract Billings**

Carkhuff Thinking System's proposal dated, April 14, 2000, proposes a budget of \$425,000 for web-ready professional development modules. Carkhuff claims in his October 26, 1999, pre-proposal that CTS will do the following:

Develop self-study training modules for The New 3Rs. A series of self-study training modules for learning and teaching the skills of The New 3Rs will be developed under this contract. That work will directly build upon previous work performed by CTS for the LINKS Project. Specifically, CTS will reorganize and simplify the twenty-five trainer-led modules previously developed by CTS for the LINKS Project so as to develop instructional materials appropriate for self-study of The New 3Rs. Those existing twenty-five modules are approximately 300 pages of information.

The contract has an attachment A which discloses the budget, and gives a breakdown of the cost to develop the twenty five modules. It notes on the budget "Create initial skills module" and this is also noted in the contract under Task 3. The first contract supposedly developed the modules costing \$130,000, however, the new contract and proposal implies otherwise. The billings relating to contract number 120-486 requested \$236,847 for the development of trainer-led modules.

I did inspect many of the booklets/modules listed in the billings of contract number 120-486. Contract number 102A-2 does not title the majority of the modules; the billings merely state "Module Development" or "Internet Modules." *The ROPES Lesson Planning Skills: Self-Study Module* development is billed for twice in contract 102A-2 for a total of \$10,549, and further billing associated to ROPES Lesson is in contract 120-486 for \$1,900. The ROPES Lesson planning is presented in the 1984 HRD Press publication

*The Productive Teacher 1: An Introduction of Curriculum Development*, co-authored by Carkhuff, Bergeson, Griffin and others. This publication followed the first series of books teaching instructional skills, the books are titled *The Skills of Teaching* and also introduce the ROPES Lesson; this series was published by HRD Press starting in 1977-1979. The first book of *The Skills of Teaching* series recognizes Dr. Shirley McCune and Dr. Andrew Griffin as the people who have been teachers to the authors.

The systems approach presented throughout the *Possibilities Schools* series is introduced by Carkhuff in his Human Productivity series published in the eighties. Other than being able to point out the similarities to previously published books, which I purchased used from Amazon.com, I have not seen any of the modules or booklets inspected at the OSPI posted on the LINKS Project website or the Possibilities Schools website. Furthermore, I am convinced that the materials produced under the name of *Possibilities Schools* or *The New Science of Possibilities* are similar if not the same as the materials presented twenty to thirty years ago under *The Skills of Teaching* and *The Human Productivity* series. The LINKS grant monies merely served to repackage what was already developed and published.

### **Specific Billing Items**

#### **The Possibilities Principal**

Shirley McCune's book *The Possibilities Principal* is the book the OSPI has failed to provide for inspection; the book is mentioned as a product deliverable of the LINKS grants—R303K000037 grant titled *Possibilities Schools* list *The Possibilities Principal* as a product of the LINKS grant R215R980003 and R215R990023. The book is also referenced in an email dated, October 9, 2000, sent to Shirley McCune from Andrew Griffin. Andrew Griffin writes, "As you know I gave [the Principals] copies of Human Possibilities and the drafts of Principals, The New 3Rs for Parents, and The New 3R's for Teachers." Aside from the references to the book, it is listed in Carkhuff Thinking Systems April 14, 2000 proposal under the section "The Possibilities Schools Curricula" that the *Possibilities Principals*, authored by Shirley McCune was published by HRD Press in 2000. To compliment the book Carkhuff Thinking Systems produced *The Possibilities Principal: The New 3Rs Skills-Kit* as part of contract 120-486. It is listed in the Carkhuff billing statements for work accomplished March 2001 to June 2001 that it cost \$2,600 to develop the Skills-Kit.

I have formally requested to receive all products developed from the LINKS Project grants and all products developed from the Carkhuff Thinking Systems' grants, and have not received *The Possibilities Principal* books. Even when I specifically requested to receive copies of *The Possibilities Principal*, I was informed per an email, dated March 22, 2004, from Jackie Hansman, Shirley McCune's secretary, that "Shirley McCune said that the Possibilities Principals book was never published—due to lack of budget." Jackie Hansman asked Andrew Griffin's office if they had a draft and was told no draft exists—they claim it was never produced due to a lack of funds. I made another formal request on May 7, 2004, to receive the *Possibilities Principal* and *Possibilities Principal*:

*New 3Rs Skills-Kit*; I received a response on May 14, 2004, stating, “On March 22, 2004 we informed you via email that the Possibilities Principals Book was never published, due to a lack of budget. Therefore, we have no document to provide to you.” OSPI continues to deny the books exist even though CTS claims to have published the *Possibilities Principal*, the book is referenced in an email as being distributed, CTS billed for the development and delivery of the *Possibilities Principal: New 3Rs Skills-Kit*, and the books are referenced in the final grant as a LINKS product, yet the OSPI adamantly claims they have no document to provide me.

### The New 3Rs Training Videos: Development and Editing

During the March 2001 to June 2001 billing cycle Carkhuff Thinking Systems billed for the development and editing of eight professional development videos titled “The New 3Rs Train the Trainer with Dr. Robert R. Carkhuff, the tapes were individually titled in the following way:

1. Introduction and Review (1)
2. Introduction and Review (2)
3. Overview
4. Relating
5. Representing
6. Goaling
7. Expanding
8. Narrowing

The cost of the development and editing was \$7,621 and the trainer’s outline cost \$1,260. I have not received for inspection any of the videos and I do not recall seeing the trainers outline. When requesting the videos I was informed by the OSPI that no videos exist except for a few videos developed by the ESD 101, however, I have not received copies of those videos either. On May 13, 2004, I spoke with Dr. Shirley McCune per telephone and requested that she provide me with the videos developed by Carkhuff; she claimed to have returned the videos and refused to accept them. When I reminded her that she paid in full for the development and editing of the videos she offered no response other than tell me to request copies of the videos from Robert Carkhuff. I told her I wanted the OSPI to provide the videos because the state of Washington paid for the development and editing of the videos. She offered no further response.

On May 14, 2004 I received a letter from the OSPI informing me that “The New 3Rs Training Videos (contract C120-486) were never edited for use. The videos described above were simply unedited recordings of a three day training-of-trainers session held by Dr. Carkhuff. They were not prepared in a final form nor made specific to education. Dr. McCune did not approve them and made the decision to end the contract.” Even though, Dr. McCune claims to have refused the videos she paid Carkhuff \$68,079, in full, as requested by Robert Carkhuff in his final billing statement.

### Termination of Contract

The termination of contract did not occur until October 26, 2001, and the OSPI has not provided the termination letter for inspection. I made a specific written request for the letter on May 7, 2004, and was informed by the OSPI in a letter dated May 14, 2004, "...a termination letter was sent to Dr. Carkhuff. However, Dr. McCune has checked her office files and the agency contract file in search of the termination letter. Unfortunately, we have not found the termination letter from 2001."

The General Provisions attached to the CTS contract specifically requires the following:

**Termination for Convenience.** This contract may be terminated by, and in the discretion of, the Superintendent of the Superintendent's designee, at any time, without reason and without liability for damages, upon written notification thereof to the Contractor. The notice shall specify the date of termination and shall be conclusively deemed to have been delivered to and received by the Contractor as of midnight of the second day following the date of its posting in the United States Mail, addressed as first noted in the body of this contract, in the absence of proof of actual delivery to and receipt by the Contractor by mail or other means at an earlier date and/or time.

### Possibilities Schools Publications Purchased for LINKS Office and Others

Carkhuff Thinking Systems billed \$20,021 for books developed under the contract 120-486. The books were for the LINKS Project office, which is the OSPI. Carkhuff billed \$3,300 for 110 *The New Possibilities Teacher*—he charged \$30.00 a book (\$170.98 for shipping), and claims it is an HRD Press product. Carkhuff also billed \$15,960 for books distributed at conferences and meetings. Aside from what was billed under contract 120-486, HRD Press was paid under five separate purchase orders at \$14,961 for a total of \$74,805. The products purchased were 5,000 *Possibilities Schools*, 500 *New Science of Possibilities*, and 1000 *Human Possibilities*. These books were purchased for distribution to the five states consortium: Arkansas, Illinois, California, Pennsylvania and Washington. The field orders were dated January 20, 2000. A total of \$110,786 was spent on books bought from HRD Press; \$74,805 was in addition to the Carkhuff Thinking Systems contract.

On January 14, 2000 the OSPI received a letter from Robert W. Carkhuff, President of HRD Press, clarifying that HRD Press is the producer and sole source of *The Possibilities Schools* and *Human Possibilities*; this letter was received only six days before the \$74,805 worth of books were purchased. A handwritten note was attached to the letter clarifying that "Possibilities Schools was written in draft form prior to the 98 award." The attached note appears to have been written by Shirley McCune. As noted on page 15 of this report, the writing and delivery of *Possibilities Schools* was done under contract 102A-2. It appears that an attempt was made to discourage any questions relating to who owned the copyrights to *The Possibilities Schools*.

### The New Science of Possibilities

The book *The New Science of Possibilities* discusses the state of Washington's Office of the Superintendent of Public Instruction's involvement with the development of Possibilities Schools—*The New Science of Possibilities* teaches how to co-process with God, and instructs the reader on how to achieve co-processing with God by using a systems approach. This idea is the intent of The New 3Rs: relating, representing, and reasoning. Whether or not Carkhuff's systems approach to achieving the higher consciousness is successful, this will not stop the Bergeson Administration's agenda of changing the traditional beliefs and values of the students and educators in Washington State. They believe this change will allow children to achieve higher consciousness to ultimately achieve godhood. This is the idea behind The New 3Rs, and the deeply rooted idea of the New Age religious teachings of a one world religion.

### Carkhuff's Proposal and Listed Publications

I examined the Carkhuff proposal more closely and noticed they had submitted a list of "The Possibilities Schools Curricula" already published by HRD Press. On April 14, 2000, Carkhuff listed the following publications as part of CTS's experience:

1. *The Possibilities Curricula*—Aspy, Benoit and **McCune**, HRD Press, 2000.
2. *The Possibilities Teacher: The New 3Rs*—Benoit, **McCune** and Carkhuff, HRD Press 2000.
3. *The Possibilities Lesson*—Benoit, Carkhuff and **McCune**, HRD Press 2000.
4. *The Possibilities Mind*—Berenson and Carkhuff, HRD Press 2000.
5. *The Possibilities Education: The Super-Vision*—**Bergeson T.**, Carkhuff, **Griffin** and **McCune**, HRD Press 2000.
6. *Human Possibilities*—Carkhuff, HRD Press 2000.
7. *The Possibilities Management System*—Carkhuff and Bellingham, HRD Press 2000.
8. *The Possibilities Learner: The New 3Rs*—Carkhuff, Benoit and **Griffin**, HRD Press 2000.
9. *The New Science of Possibilities I: The Processing Science*—Carkhuff and Berenson, HRD Press 2000.
10. *The New Science of Possibilities II: The Processing Technologies*—Carkhuff and Berenson, HRD Press 2000.
11. *The Possibilities Leader: The New Science of Possibilities Management*—Carkhuff and Berenson, HRD Press 2000.
12. *The Possibilities Organization: The New Science of Possibilities Management*—Carkhuff and Berenson, HRD Press 2000.
13. *The Possibilities Culture*—Carkhuff, Berenson, **Griffin** and **McCune**, HRD Press 2000.
14. *The Possibilities Economics*—Carkhuff, Cook and Rayson, HRD Press 2000.
15. *Possibilities Learning*—Carkhuff, **Griffin**, and **McCune**, HRD Press 2000.

16. *The Possibilities Community*—Carkhuff, **Griffin** and **McCune**, HRD Press, in preparation, 2000.
17. *The Possibilities Schools*—Carkhuff and **McCune**, HRD Press 2000.
18. *The Possibilities Parent*—**Griffin**, HRD Press 2000.
19. *Strategic Planning for Educators*—**McCune**, American Society for Curriculum Development 1991.
20. *The Possibilities Principal*—**McCune**, HRD Press 2000.

Publication number 5: *The Possibilities Education: The Super-Vision*, coauthored by Terry Bergeson, Robert Carkhuff, Andrew Griffin and Shirley McCune, and published by HRD Press 2000, is listed in Carkhuff Thinking System's August 2000 billing as being developed by Robert Carkhuff in July 2000 at the cost of \$10,000. Even though, it is listed in the proposal of April 14, 2000 as already in print and published by HRD Press, the OSPI reimburses Carkhuff Thinking Systems \$10,000 for *The SUPER-Vision*.

Publications number 2 and 8: *The Possibilities Teacher: The New 3Rs*, coauthored by Don Benoit, Shirley McCune and Robert Carkhuff, and published by HRD Press 2000, and *The Possibilities Learner: The New 3Rs*, co-authored by Robert Carkhuff, Don Benoit and Andrew Griffin, published by HRD Press 2000 were billed for development in March 2001. Specifically, the OSPI reimbursed Carkhuff Thinking Systems \$25,960 for both publications even though they were listed in the April 14, 2000 proposal as already published by HRD Press 2000.

#### Possibilities Schools Website

The Possibilities Schools website was developed under contract 120-486. Carkhuff Thinking Systems also developed for the website "Rating Your School." The requested reimbursement for the cost to develop the site along with "Rating Your School" was \$96,545. The website provides information on the Possibilities Schools program and offers a series of Possibilities Schools' books for sale. The site provides an online and a downloadable version of the "Rating Your School" product. The "Rating Your School" questionnaire does not provide a rating—meaning I answered the questions three different ways, and was provided the same rate or conclusion all three times. When you are finished with the rating process you are directed to a list of *Possibilities Schools* books for sale, and provided a number to call to order the books. There is no rating process involved with the "Rating Your School," the website is intended to sell the idea of the New Science of Possibilities by promoting the *Possibilities Schools* series of books sold by HRD Press/ Possibilities Publishing.

### **Product Ownership**

Contract 120-486 has the same general provisions as contract 102A-2 in relation to ownership rights of products developed with contract funds.

**Ownership of Work Products and Other Personal Property, and Real Property.** Data which originates from this contract shall be “works for hire” as defined by the U.S. Copyrighted Act of 1976 and shall be owned by the Superintendent. Data shall include, but not be limited to, reports, documents, pamphlets, articles, books, magazines, surveys, studies, computer programs, films, tapes, and/or sound reproductions. Ownership includes ownership of all intellectual concepts and properties embodied in data, the right to copyright, patent or register data, and the right to transfer ownership of data.

### **Carkhuff Thinking System’s Subcontractors**

Limelight Technologies and Dawn Knutzen were both OSPI contractors, and both were listed as persons working under the Carkhuff Thinking System’s contract with the OSPI. Limelight Technologies ultimately received approximately 1.7 million dollars from the OSPI to develop the LINKS website. In June 2000 Limelight Technologies received their first contract with the OSPI for \$11,800 to “develop prototype web site of demo pages for the LINKS learning modules web site,” this was reported on the Office of Financial Managements OSPI’s contract list. Carkhuff Thinking System’s billed \$22,025 for Limelight Technologies performing work in July 2000. CTS’s claims work was “Demonstration of Technology capability for LINKS Website (CD).” Limelight Technologies contract with the OSPI in July 2001 was directed to develop a digital text of Possibilities Schools for the website with the estimated cost of \$64,800. I have not inspected or been presented with any digital form of the Possibilities Schools materials. Based on the LINKS expenditures contract C23-0044 was paid nearly 1.06 million dollars, which was more than the contracted amount of 1.004 million dollars.

Dawn Knutzen was awarded a contract with the OSPI for \$27,000 to commence on November 5, 1999 and end on August 30, 2000 to perform the following duties:

Provide training on math.ed.ology and the improvement of mathematics curriculum and instruction.

Maintain on-line consultation/support and information for Washington teachers.

Assist in the collection of evaluation information for math.ed.ology program.

Assist with the general administration of the LINKS project and the preparation of LINKS products.

Carkhuff Thinking Systems billed for work performed by D. Knutzen in the months of June and July 2000. CTS bills for 19.5 days at \$240 a day for a total of \$4,680 for work listed as “Math Curriculum Materials.” The billing does not give specific days of work performance.

## **Travel Reimbursements**

Carkhuff Thinking System's billed for reimbursements for three plane tickets costing \$2,097, \$2,323, and \$2,263 to attend the Washington state conference, taxis for \$132, \$600 for three people to eat for four days, one flight costing \$186, parking at \$20, taxi \$36, D.C. to Hartford plane ticket for \$525 and another for \$363, ground transportation for \$163, Air, hotel and cab for Robert Carkhuff costing \$1230, and travel expenses, no specifics, at \$564. A total of \$10,260 was requested for reimbursement; these reimbursements were approved for payment by Dr. Shirley McCune, without any receipts, ticket stubs, hotel bills requested or presented. When I requested to review the documents supporting travel reimbursement requests I was told Carkhuff did not have to provide receipts, and if I wanted I could make a request to Robert Carkhuff for those documents.

In fact, when I made a written request to receive copies of the receipts in a letter dated May 7, 2004, Jennifer Priddy, Assistant Superintendent informed me in a letter dated, May 14, 2004, "The contract with Carkhuff Thinking Systems was for the services of the contractor which included travel expenses. Invoices were sent to Dr. McCune, who reviewed them for reasonable charges. This process is in compliance with the Office of Financial Management regulations. We do not have copies of the original receipts." Carkhuff Thinking Systems is required to keep his records for 15 years after the contract end date.

## **Summary of Findings**

In summary, it does not appear that any of the products developed under contract 120-486 are being used on the LINKS website. The only place other than the Possibilities Schools website and HRD Press that has evidence of products produced with contracts 102A-2 and 120-486 is the OSPI LINKS Project office, and then only as archived public documents.

<p>I have contacted the State Attorney General and the Governor numerous times by telephone and formal letters attempting to inform them of the malfeasant behavior discussed in this report. My efforts have been unsuccessful; both the Governor and the Attorney General have taken no action to address the concerns I have raised, nor has the State Auditor.</p>
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## **State Contracts with the LINKS Project**

Four states were contracted with under the LINKS Project: Pennsylvania, Arkansas, California and Illinois. Three of the states received funding from the first grant by way of the contract the OSPI awarded the ESD 101 in 1998 (102A-1). Pennsylvania, Arkansas, and Illinois received under a subcontract with the ESD 101 between \$81,000 and \$100,000 each. The OSPI has not provided a description of work completed by the ESD 101 and the subcontractors, nor is there any language in the ESD 101 contract specifying the work to be completed by the three states.

Beginning in late 1999 and early 2000 the OSPI awarded contracts under the LINKS Project to four states: Pennsylvania, Arkansas, California and Illinois. The States received the following contracts:

Illinois received two contracts:

C120-266 for \$200,000—November 3, 1999

C120-831 for \$360,000—December 13, 2000

Arkansas received two contracts:

C120-246 for \$600,000—October 13, 1999

C120-830 for \$350,000—December 13, 2000

Pennsylvania received two contracts:

C120-583 for \$400,000—June 23, 2000

C23-0097 for \$97,500—Cancelled

California received two contracts:

C120-324 for \$400,000—January 12, 2000

Contract for \$380,477—Cancelled

I have not been presented with any of the deliverables associated to the contracts awarded the above States. The OSPI has not provided any direction to assist me in understanding what was gained from the above contracts. I have accessed the different educational agency sites and cannot determine how the LINKS Project funds have assisted the States.

The St. Clair County Office of Education in Illinois received an actual amount of \$176,564 for services provided under contract 120-266, and Madison County Regional Office of Education in Illinois received \$360,000 under contract 120-831. The California Department of Education received an actual amount of \$289,104 under contract C120-324. The Pennsylvania Department of Education received an actual amount of \$400,000 under contract 120-583. The Arkansas Department of Education received an actual amount of \$560,250 under contract 120-246, and \$350,000 under contract 120-830.

#### State Possibilities Schools Conferences

When I requested to receive documentation giving evidence of the State conferences I did not receive any evidence supporting that a conference took place. Carkhuff Thinking Systems' billing requested payment for one conference in the State of Washington, costing \$10,500 for three individuals to deliver the four day conference and three days of preparation each. Carkhuff Thinking Systems proposed in their budget that the conference would cost \$6,500, which includes travel and lodging. The actual cost to deliver the conference in Washington was \$17,916.

Other than meeting with the Arkansas Superintendent to present the Possibilities Schools, costing \$4,500, and meeting with the Multi-State LINKS Project leaders, costing \$5,800, no other conferences were billed for attendance of Carkhuff Thinking

Systems' personnel. Aside from the nearly \$75,000 worth of HRD Press publications purchased for the State conferences, CTS billed \$9,849 for books distributed at the Washington State conference, \$1,136 worth of books for a conference in St. Louis, \$1,624 worth of books for a leaders conference in Santa Clara, \$1,929 worth of books for a Multi-State conference, location unknown.

The conference in Washington State involved the Unity Project schools, which served as the schools piloted for the Possibilities Schools program implementation. The schools were chosen based on their high percentages of minority populations and as needing assistance to increase their WASL test scores. Dr. Andrew Griffin headed up the project; he stated in his September 2001 report, "Unity Project draws heavily from the work of Carkhuff's—"Human Resource Development I and II" and related works." Based on evidence found in Andrew Griffin's emails, the Unity Project schools chosen to pilot the Possibilities Schools program failed to show a significant improvement in scores or in eliminating the achievement gap. A Microsoft Excel spreadsheet demonstrates the test scores of students in the Unity schools from 1997 to 2002.

The Unity Project received funds from various sources; one of the sources was the LINKS Project grant funds. Approximately \$60,000 of LINKS funds were directed to the Unity Project schools.

### **LINKS Grant Expenditures from Internal Accounting System**

I requested to receive a complete accounting of all funds received and spent under the LINKS Project, and was provided with a 132 page document. There are many unexplained expenditures, and throughout the document it becomes clear that the OSPI transferred funds from one grant fund to another to give the appearance that funds were taken from the funding source noted in the contract, and to give the appearance all funds were drawn down to a zero balance during the grant budget period. This was done with many of the personal service contracts, including Carkhuff Thinking Systems, and with the contract funds paid the individual state agencies involved with the LINKS Project.

### **LINKS Learning Website**

The LINKS Learning website is the final product outcome of the four grants described on page 1 of this report. The final outcome of the LINKS Project grants is clearly different than what was planned in 1998. The final grant describes in Appendix A: the LINKS Project products. Based on the document, it was the plan of the LINKS Project to have a five state interactive web site that demonstrates state of the art professional development using videostreaming, print, and representation. It was also noted that the products delivered under the State contracts would be made available on the LINKS website. For example, California's "program providing step-by-step technical assistance for analyzing state assessment results and developing plans to strengthen

teaching and learning will be available,” and be adapted for use on the LINKS web site to reflect other state assessment systems.

I have explored the websites of the four States involved with the LINKS Project and cannot find Links Learning mentioned on the sites. The LINKS Learning website does not link to the States involved, nor is there any information associated to other States. The only links offered are found under the kids section titled “Life Ready.” This section is intended to assist children with career and life planning. The workbooks offer featured links to inspire creativity, writing and the imagination. One site in particular is advertised as being a “safe haven where creativity flourishes. The Soul Food Café aims to promote writing and creative pursuits as a daily practice. The site is quite literally overflowing with healthy and tasty morsels for every artist. It’s full of tips, techniques, references and encouragement.”

The LINKS Learning website links a student to the following:

- pornographic pictures
- anti-President George W. Bush sentiments expressed with sexual explicit photographs and foul language
- anti-American sentiments
- anti-Jewish sentiments
- anti-Christian sentiments
- graphic pictures of the beheading of Nick Berg
- morbid art work
- teachings of guided imagery and visualization
- teachings of prayer
- how to access your muse (a spirit guide)
- introducing journaling prompts that are sexually oriented, about killing, drinking alcohol, spirituality and more
- how to make tarot cards
- Buddhism

These are only some examples of what is accessible by way of LINKS Learning. You can access the site from the OSPI website at <http://www.k12.wa.us/> scroll down and access Links Learning under the Resource Tools on the left hand side. Once you access the site you click on enter and the site home page is on screen, click on Life Ready either by way of the kids menu or on the left hand side main menu. The site then offers many options and will lead a student to the featured sites: Soul Food Café, Creativity Portal, and Tera’s Wish are three key links. The various booklets list the featured sites and encourage linkage to the sites.

The Soul Food Café uses art to lead a student to believe the content is acceptable. Each site that is accessible from the Soul Food Café presents itself in a way that demonstrates an artistic point of view. The artistic approach used by the Soul Food Café is deceiving—meaning the art work is used to influence a person’s beliefs and values.

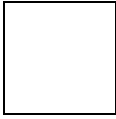
Many of the sites linked from the Soul Food Café are very political, and have links that lead a person further into the occultist beliefs promoted by Shirley McCune and others.

After spending many hours exploring the Soul Food Café and linked sites it is clear that the intent is to lead a student deeper and deeper into the ideas and beliefs of the New Age religion, and the extremists' views against the current Administration. Each link has more links taking the student deeper into the world of occultism, and introduces a student to pornography, satanic worship, morbid sites promoting killing, and sexually explicit material is provided. I have yet to find a site that supports President George W. Bush; the sentiments are all anti-George W. Bush.

It appears that the intent of the LINKS Learning site is to promote a spiritual view that incorporates every kind of religious view, although at the same time undermining the traditional beliefs and values of one faith religions. The site claims "it is the perfect place to spread your writing wings and work with a muse." The spiritualism introduced on the Soul Food Café website is clearly designed to change a student's beliefs and values; the website claims the use of personal journals improves "writing skills, journals also work to change that student's enduring attitudes, values and sense of personal identity." This is the intent of the Bergeson Administration, and the curriculum in our public schools reflects the ideas presented in the Soul Food Café and related links. The WASL is designed to drive the curriculum, which ultimately will change the beliefs and values of our children. The Bergeson Administration's close relationship to New Age Religious organizations has allowed their religious views to invade our public schools, and Robert Carkhuff's idea of The New 3Rs and the Possibilities Schools was their first attempt to restructure the public educational system, ultimately to gain control of our children's minds. How successful they have been to incorporate their ideas and values in our public schools will be addressed in Part III and Part IV.

Below on page 41 is a portion of the LINKS Learning home page with Kids link to Life Ready, if you have received this report per email you can click on the Life Ready section you may be able to access the site from this report:

## [Kids](#)



[Home](#)

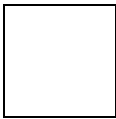
[Math](#)

[Reading](#)

[Life Ready](#)

Whether you're a kid or a kid at heart, you will find lots of fun things to learn about here. Check out the interactive [Math Illustrated Lessons!](#)

## [Teachers](#)



[Home](#)

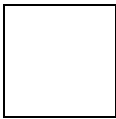
[Math](#)

[Reading](#)

[Science](#)

If you are a teacher, you can locate important information about mathematics, reading, and science, as well as other general information and classroom resources.

## [Principals](#)

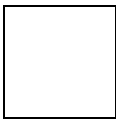


[Home](#)

[School Improvement](#)

If you are a principal, you can get information on school leadership, as well as other school management resources.

## [Superintendents](#)



[Home](#)


[Leadership Fables](#)

If you are a superintendent, you can tap into resources that can help you provide the vision, empowerment, and hope needed for change efforts.

## [Parents](#)

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If you are a parent, you are your child's first and continuing teacher. Here you will find strategies you can use to help your kids learn.



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