



February 9, 2023

**VIA EMAIL:**

State Board of Administration of Florida  
1801 Hermitage Blvd., Suite 100,  
Tallahassee, FL 32308  
[PublicRecords@sbafla.com](mailto:PublicRecords@sbafla.com)

**Re: Public Records Request**

Dear Public Records Officer:

Pursuant to Article I, section 24(a), of the Florida Constitution, and Florida's public records laws, as codified at Fla. Stat. Chapter 119, American Oversight makes the following request for records.

**Requested Records**

American Oversight requests that your office promptly produce the following:

1. All electronic communications (including email messages, complete email chains, calendar invitations, text messages, and any attachments) between (a) any State Board of Administration (SBA) official listed below, and (b) any listed Florida Department of Financial Services or Department of Management Services official.

SBA Officials

- a. Interim Executive Director & Chief Investment Officer Lamar Taylor
- b. Deputy Executive Director Kent Perez
- c. Senior Investment Officer Katy Wojciechowski
- d. Senior Investment Officer John Benton
- e. Chief Audit Executive Kimberly Stirner

Florida Department of Financial Services Officials

- a. Florida Chief Financial Officer Jimmy Patronis
- b. Chief of Staff Peter Penrod
- c. Deputy Chief of Staff Susan Miller
- d. Treasury Director Tanner Collins
- e. General Counsel Michael Dobson
- f. Deputy CFO over Operations Scott Fennel
- g. Senior Cabinet Aide Robert Tornillo

Department of Management Services Officials



- a. Secretary Pedro Allende
- b. Deputy Secretary Katie Parrish
- c. Director of Retirement Andrea Simpson
- d. Director of State Group Insurance Ryan Stokes

For part 1 of this request, please provide all responsive records from November 15, 2022, through January 15, 2022.

2. Any handouts, agendas, summaries, or notes provided in connection with any meetings with the Florida Treasury regarding the State of Florida's divestment from BlackRock, including, but not limited to: (a) electronic or hard-copy records provided by attendees, participants, or organizers of any such meetings, or (b) formal or informal notes, descriptions, or analyses of any such meetings created by the SBA Officials specified in Part 1 of this request.

For part 2 of this request, please provide all responsive records from October 15, 2022, through the date the search is conducted.

3. All electronic communications (including email messages, complete email chains, calendar invitations, text messages, and any attachments) between (a) any of the SBA officials listed below, and (b) any individual or anyone communicating on behalf of an organization listed below, including, but not limited to, anyone communicating from the listed email address(es) or an email address ending in the listed domain(s).

#### SBA Officials

- a. Interim Executive Director & Chief Investment Officer Lamar Taylor
- b. Deputy Executive Director Kent Perez
- c. Senior Investment Officer Katy Wojciechowski
- d. Senior Investment Officer John Benton
- e. Chief Audit Executive Kimberly Stirner

#### Outside Entities

- a. Consumers' Research, including but not limited to Will Hild (consumersresearch.org)
- b. Consumers' Defense (consumersdefense.com)
- c. Leonard Leo ([leonard.leo@fed-soc.org](mailto:leonard.leo@fed-soc.org), [honestelections.org](http://honestelections.org), [lleo@leonardleo.com](mailto:lleo@leonardleo.com), [leonard.anthony.leo@gmail.com](mailto:leonard.anthony.leo@gmail.com), [lleo@fed-soc.org](mailto:lleo@fed-soc.org), [leonard.leo@mindspring.com](mailto:leonard.leo@mindspring.com), [leonard.leo@hotmail.com](mailto:leonard.leo@hotmail.com))
- d. CRC Advisors, including but not limited to Mike Thompson (crcadvisors.com or crcpublicrelations.com)
- e. State Financial Officers Foundation (sfof.com)
- f. Free Enterprise Project or the National Center (nationalcenter.org)
- g. Andy Puzder (ckr.com, Puzder.com, [andy@puzder.com](mailto:andy@puzder.com))

- h. Job Creators Network, including but not limited to Bernie Marcus, Alfredo Ortiz, or Tyrone Latchman (JobCreatorsNetwork.com)
  - i. Strive Asset Management, including but not limited to Vivek Ramaswamy (strive.com)
  - j. Heritage Foundation or Heritage Action for America (heritage.org, heritageaction.com)
  - k. American Legislative Exchange Council, including but not limited to Jonathan Williams (alec.org)
  - l. Florida Representative Daniel Perez
4. Any final assessments, determinations, impact analyses, or evaluations—including, but not limited to, memoranda, opinions, emails, or other informal communications created by, shared with, or otherwise in the possession of your office—regarding the financial impact of divesting from financial institutions, asset managers, or private corporations that have adopted or utilize environmental, social, and governance (ESG) factors in selecting investments.

For parts 3 and 4 of this request, please provide all responsive records from January 1, 2022, through the date the search is conducted.

Please notify American Oversight of any anticipated fees or costs in excess of \$100 prior to incurring such costs or fee.

American Oversight seeks all responsive records regardless of format, medium, or physical characteristics. In conducting your search, please understand the term “record” in its broadest sense, to include any written, typed, recorded, graphic, printed, or audio material of any kind. We seek records of any kind, including electronic records, audiotapes, videotapes, and photographs, as well as letters, emails, facsimiles, telephone messages, voice mail messages and transcripts, notes, or minutes of any meetings, telephone conversations or discussions. Our request includes any attachments to these records. **No category of material should be omitted from search, collection, and production.**

Please search all locations and systems likely to have responsive records regarding official business. **You may not exclude searches of files or emails in the personal custody of your officials, such as personal email accounts.** Emails or texts conducting government business sent or received on the personal account of the government official constitutes a record for purposes of Florida’s public records laws.<sup>1</sup>

In addition, American Oversight insists that your agency use the most up-to-date technologies to search for responsive information and take steps to ensure that the most complete repositories of information are searched. American Oversight is available to work with you to craft appropriate search terms. **However, custodian searches are**

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<sup>1</sup> *Cf. State v. City of Clearwater*, 863 So. 2d 149, 154 (Fla. 2003) (“The determining factor is the nature of the record, not its physical location.”).

**still required; your office may not have direct access to files stored in .PST files, outside of network drives, in paper format, or in personal email accounts.**

In the event some portions of the requested records are properly exempt from disclosure, please disclose any reasonably segregable non-exempt portions of the requested records. If it is your position that a document contains non-exempt segments, but that those non-exempt segments are so dispersed throughout the document as to make segregation impossible, please state what portion of the document is non-exempt, and how the material is dispersed throughout the document. If a request is denied in whole, please state specifically that it is not reasonable to segregate portions of the record for release.

Please take appropriate steps to ensure that records responsive to this request are not deleted by your office before the completion of processing for this request. If records potentially responsive to this request are likely to be located on systems where they are subject to potential deletion, including on a scheduled basis, please take steps to prevent that deletion, including, as appropriate, by instituting a litigation hold on those records.

To ensure that this request is properly construed, that searches are conducted in an adequate but efficient manner, and that extraneous costs are not incurred, American Oversight welcomes an opportunity to discuss its request with you before you undertake your search or incur search or duplication costs. By working together at the outset, American Oversight and your agency can decrease the likelihood of costly and time-consuming litigation in the future.

Where possible, please provide responsive material in electronic format by email or in PDF or TIF format on a USB drive. Please send any responsive material being sent by mail to American Oversight, 1030 15th Street NW, Suite B255, Washington, DC 20005. If it will accelerate release of responsive records to American Oversight, please also provide responsive material on a rolling basis.

## **Conclusion**

American Oversight is a 501(c)(3) nonprofit with the mission to promote transparency in government, to educate the public about government activities, and to ensure the accountability of government officials. American Oversight uses the information gathered, and its analysis of it, to educate the public through reports, press releases, or other media. American Oversight also makes materials it gathers available on its public website and promotes their availability on social media platforms, such as Facebook and Twitter.<sup>2</sup>

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<sup>2</sup> American Oversight currently has approximately 16,000 followers on Facebook and 113,000 followers on Twitter. American Oversight, Facebook, <https://www.facebook.com/weareoversight/> (last visited Feb. 8, 2023); American Oversight (@weareoversight), Twitter, <https://twitter.com/weareoversight> (last visited Feb. 8, 2023).

We share a common mission to promote transparency in government. American Oversight looks forward to working with your agency on this request. If you do not understand any part of this request, have any questions, or foresee any problems in fully releasing the requested records, please contact Taylor Stoneman at [records@americanoversight.org](mailto:records@americanoversight.org) or (202) 848-1319.

Sincerely,

/s/ Taylor Stoneman  
Taylor Stoneman  
on behalf of  
American Oversight