



Agenda

Board of Trustees

Regular Meeting

Location: Center for Advanced Technical Studies

Video Livestream: <https://www.youtube.com/watch?v=mLlvFj2MlyE>

August 21, 2023

1. Call to order at 5:00 p.m.
2. Approval of the agenda
3. Enter Executive Session to consider the following:
 - a. Selected employment items (Exhibit A) (Action)
 - b. Selected employment items (Exhibit B) (Information Only)
 - c. Receipt of legal advice regarding Board Policy GBEB (Exhibit C)
 - d. Contractual matter regarding Social-Emotional Learning (SEL) (Exhibit D)
 - e. Legal advice regarding request for use of facilities (Exhibit E)
4. Call to order and convene regular meeting at 7:00 p.m.
5. Welcoming remarks – Rebecca Blackburn Hines, Board Chair
6. Invocation – Kevin Scully, Board of Trustees
7. Pledge of Allegiance – Kevin Scully, Board of Trustees
8. School Board Spotlight
9. Superintendent's Report
 - a. District FOCUS: Strategic Plan Update for 2022-2023 to 2026-2027
 - b. ESSER Quarterly Update (Exhibit F)
 - c. Back to School 2023-2024
10. Approval of the minutes of the August 7, 2023, board meeting

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1020 Dutch Fork Road • Irmo, South Carolina 29063 • (803) 476-8000

"We Love and Grow Our Students!"

11. Public Participation*

ACTION AGENDA

12. Action as Necessary or Appropriate on Matters Discussed in Executive Session
13. Approval of Minority Business Enterprise Utilization Plan (Exhibit G)
14. First Reading Approval of Proposed Revisions to Board Policy IKACC “Placement of Non-Accredited Private and Home School Secondary Students” (Exhibit H)
15. First Reading Approval of Proposed Revisions to Board Policy IHCA “Summer School” (Exhibit I)
16. First Reading Approval of Proposed Revisions to Board Policy IJNDAA “Distance, Online, and Virtual Education” (Exhibit J)
17. First Reading Approval of Proposed Revisions to Board Policy IKG “Secondary Education” (Exhibit K)
18. First Reading Approval of Proposed Revisions to Board Policy IKD “Honor Rolls” (Exhibit L)

DISCUSSION AGENDA

19. Update on Five-Year Master Facilities Plan
20. Discussion Regarding a Procurement Matter (Exhibit M)
21. Board Retreat – September 15, 2023 (Exhibit N)
22. Adjourn

INFORMATION AGENDA

23. Minority Business Procurements (Exhibit O)
24. Strategic Plan Update for 2022-2023 to 2026-2027 (Exhibit P)
25. McMillan, Pazdan, Smith Population and Enrollment Forecasts, 2023-24 Through 2032-33 (Exhibit Q)
26. The next regular scheduled board meeting will be September 11, 2023, at the Center for Advanced Technical Studies.

* The Board welcomes and encourages public participation. We respectfully ask that you adhere to the procedures provided in board policy BEDH “Public Participation at Meetings”. Your comments should be limited to three minutes and must remain on either the topic noted on your sign-in form or a listed agenda item. Questions asked during public participation will be handled in accordance with board policy BEDH.



Minutes/August 7, 2023

The Board of Trustees of School District Five of Lexington and Richland Counties met at the District Office Administration Building with the following members present:

Mrs. Elizabeth Barnhardt (Absent)
Mrs. Rebecca Blackburn Hines, Chair
Mr. Matt Hogan, Vice Chair
Mrs. Catherine Huddle
Mike Satterfield
Kevin Scully
Kimberly Snipes, Secretary
Dr. Akil Ross, Superintendent

The following staff were in attendance:

Dr. Michael Harris, Chief Student Services and Planning Officer
Mrs. Tina McCaskill, Chief Academics Officer
Ms. Maddison Paul, Chief Financial Officer
Mrs. Amanda Taylor, Director of Communications
Dr. Reggie Wicker, Director of Personnel
Mr. Dave Weissman, Executive Director of Operations

A livestream video link was provided to the public as a viewing option for the August 7, 2023, board meeting.

Chair Blackburn Hines called the regular meeting to order and gave welcoming remarks.

Mike Satterfield, Board of Trustees, gave the Invocation and Pledge of Allegiance.

During the Superintendent's Report, Dr. Ross presented updates on District FOCUS: Strategic Plan Update for 2022-2023 to 2026-2027, Priorities for 2023-2024; and District-Wide SEL Program Update.

During the public participation, Brandi Sturdevant spoke about book bans; Kathryn Satterfield spoke about books and educator support; Susan Adams spoke about student feelings, resources/information, and excellence in education; Kim Benson spoke about freedom to teach and read; and Steve Nuzum spoke about intellectual freedom.

The Board presented for discussion:

- Update on the Construction Projects at Irmo High School and Chapin High School
- Discussion of Proposed Revisions to Board Policy IKACC "Placement of Non- Accredited Private and Home School Secondary Students" (Exhibit H)
- Discussion of Proposed Revisions to Board Policy IHCA "Summer School" (Exhibit I)
- Discussion of Proposed Revisions to Board Policy IJNDAA "Distance, Online, and Virtual Education" (Exhibit J)

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A = Absent
AB = Abstain
N = No
X = Yes
R = Recuse

- Discussion or Proposed Revisions to Board Policy IKG "Secondary Education" (Exhibit K)
- Discussion of Proposed Revisions to Board Policy IKD "Honor Rolls" (Exhibit L)

The board presented for information:

- Revisions to Administrative Rule IKF-R "Graduation Requirements" (Exhibit M)
- Revisions to Administrative Rule IKA-R "Grading/Assessment Systems" (Exhibit N)

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N = No
X = Yes
R = Recuse

Record of Voting

**SCHOOL DISTRICT FIVE
OF
LEXINGTON AND RICHLAND COUNTIES**

Meeting of August 7, 2023

	B A R N H A R D T	B L A C K B U R N H I N E S	H O G A N	H U D D L E	S A T T E R F I E L D	S C U L L Y	S N I P E S
1. M. Hogan S. Scully Approve the agenda.	A	X	X	X	X	X	A
2. M. Scully S. Hogan I make the motion to enter executive session to consider the following: a.) Employee Grievance Hearing (Exhibit A); b.) Selected employment items (Exhibit B) (Action); c.) Selected employment items (Exhibit C) (Information Only); d.) Contractual matter regarding Professional Development Services (Exhibit D); e.) Legal advice regarding procurement matter.	A	X	X	X	X	X	A
3. M. Hogan S. Snipes I move that we approve the minutes of the July 13, 2023, special-called board meeting.	A	X	X	X	X	X	X
4. M. Hogan S. Huddle I move that we approve the minutes of the July 17, 2023, special-called board meeting.	A	X	X	X	X	X	X
5. M. Snipes S. Scully I move that we support the District's position on the employee grievance (Exhibit A).	A	N	X	N	X	X	X
6. M. Hogan S. Snipes I move that we approve the selected employment items as shown in Exhibit B for action.	A	X	X	X	X	X	X

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**SCHOOL DISTRICT FIVE
OF
LEXINGTON AND RICHLAND COUNTIES**

Meeting of August 7, 2023

	B A R N H A R D T	B L A C K B U R N H I N E S	H O G A N	H U D D L E	S A T T E R F I E L D	S C U L L Y	S N I P E S
7. M. Huddle S. Hogan I move that we approve the two proposed contracts with Novak Education and School District Five during the 2023-2024 school year. Contingent upon the contract changes recommended by our attorney. (Exhibit D)	A	X	X	X	X	X	X
8. M. Hogan S. Satterfield I move that we approve the second and final reading of proposed revisions to Board Policy GCQE "Retirement of Professional Staff." (Exhibit E)	A	X	X	X	X	X	X
9. M. Huddle S. Hogan I move that we approve the second and final reading of proposed revisions to Board Policy GDQC "Retirement of Support Staff." (Exhibit F)	A	X	X	X	X	X	X
10. M. Hogan S. Snipes I move that we approve the adoption of textbook Emergency Medical Services (EMS) as shown in Exhibit G.	A	X	X	X	X	X	X
11. M. Hogan S. Snipes Adjourn at 8:05 p.m.	A	X	X	X	X	X	X

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EXHIBIT F

MEMORANDUM

To: Members of the Board of Trustees

From: Maddison Paul,
Chief Financial Officer

A handwritten signature in black ink, appearing to read "Maddison Paul", is written over the printed name.

Date: August 17, 2023

Re: August 21, 2023 Board Meeting
Superintendent's Report
ESSER Quarterly Update

Attached for your information are the budget and expenditure reports for ESSER I, II and III through June 30, 2023.

Attachments

School District Five of Lexington and Richland Counties

Elementary and Secondary School Emergency Relief Funds (ESSER I) - CARES Act

as of June 30, 2021

<u><i>Priority</i></u>	<u><i>Budget</i></u>	<u><i>Committed</i></u>	<u><i>Expenditure</i></u>	<u><i>Remaining</i></u>
Coordination of Preparedness and Response Efforts	\$14,180.00		\$14,180.00	\$0.00
Provisions for Principals and other School Leaders	\$26,299.00		\$26,299.00	\$0.00
Other Activities to maintain the Operation of and Continuity of Services within the District *	\$1,589,403.00		\$1,589,403.00	\$0.00
Total	\$1,629,882.00	\$0.00	\$1,629,882.00	\$0.00

** Student Nutrition and Bus Drivers providing continued services to students between March 16, 2020 and June 30, 2020*

*** \$7,870.14 provided for equitable services for non-public, nonprofit schools within District Five*

Deadline for Final Spending 9/30/2022

School District Five of Lexington and Richland Counties

Elementary and Secondary School Emergency Relief Funds (ESSER II)

as of June 30, 2023

<u><i>Priority</i></u>	<u><i>Budget</i></u>	<u><i>Committed</i></u>	<u><i>Expenditure*</i></u>	<u><i>Remaining</i></u>
Adult Education and Family Literacy Act	\$ 2,330.58	\$ -	\$ 2,330.58	\$ -
Sanitation Services and Supplies	\$ 428,896.44	\$ -	\$ -	\$ 428,896.44
Provision of Mental Health Services and Supports	\$ 1,191,178.76	\$ 18,921.60	\$ 1,071,087.59	\$ 101,169.57
Addressing Learning Loss Among Students	\$ 2,500,000.00	\$ -	\$ 2,483,380.91	\$ 16,619.09
School Facility Repairs and Improvements	\$ 572,655.08	\$ -	\$ 572,655.08	\$ -
Improve Indoor Air Quality in School Facilities	\$ 1,984,758.14	\$ -	\$ 1,984,758.14	\$ -
Total	\$ 6,679,819.00	\$ 18,921.60	\$ 6,114,212.30	\$ 546,685.10

* includes FY20-21 & FY21-22 Expenditures

Deadline for final spending 9/30/2023

School District Five of Lexington and Richland Counties

American Recovery Plan - Elementary and Secondary School Emergency Relief Funds (ESSER III)

as of June 30, 2023

<u><i>Priority</i></u>	<u><i>Budget</i></u>	<u><i>Committed</i></u>	<u><i>Expenditure*</i></u>	<u><i>Remaining</i></u>
Addressing Learning Loss	\$ 3,306,000.40	\$ 26,423.64	\$ 1,146,277.45	\$ 2,133,299.31
Adult Education and Family Literacy	\$ 146,000.00	\$ -	\$ -	\$ 146,000.00
Coordination of Preparedness and Response Efforts	\$ 378,000.00	\$ -	\$ 61,325.65	\$ 316,674.35
Activities to Address the Unique Needs of Students	\$ 511,349.60	\$ -	\$ 163,975.63	\$ 347,373.97
Sanitation Services and Supplies	\$ 148,996.75	\$ -	\$ 56,124.45	\$ 92,872.30
Planning and Coordination during Long-term Closures	\$ 72,000.00	\$ -	\$ 72,000.00	\$ -
Purchase of Educational Technology	\$ 90,000.00	\$ -	\$ 19,197.00	\$ 70,803.00
Provision of Mental Health Services and Supports	\$ 3,139,003.25	\$ -	\$ 1,220,308.46	\$ 1,918,694.79
School Facility Repairs and Improvements	\$ 2,000,000.00	\$ -	\$ 1,642,566.12	\$ 357,433.88
Improve Indoor Air Quality in School Facilities	\$ 4,911,342.00	\$ 177,982.88	\$ 3,674,050.86	\$ 1,059,308.26
Strategies and Public Health Protocols	\$ 310,000.00	\$ -	\$ 66,928.59	\$ 243,071.41
Total	\$ 15,012,692.00	\$ 204,406.52	\$ 8,122,754.21	\$ 6,685,531.27


****Includes FY21-22 Expenditures***

Deadline for Final Spending 9/30/2024



MEMORANDUM

To: Members of the Board of Trustees

From: Maddison Paul,
Chief Financial Officer 

Date: August 17, 2023

Re: August 21, 2023 Board Meeting
Action Item
Minority Business Enterprise Utilization Plan

Item: Minority Business Enterprise Utilization Plan

Background: Section 5240 of the District's Procurement Code, approved April 2022, discusses the requirements for the minority business enterprise (MBE) utilization plan to emphasize the use of minority small businesses. The plan must include a goal of expending 10% of the District's total dollar amount of funds and the procedures in place to work towards this goal. The plan should be approved by the Board of Trustees by the first meeting after July 31st each year. The administration will ensure this deadline is met in future years. Additionally, the updated procurement code requires progress reports every 6 months, which are attached to the information section of the agenda. The next progress report will be presented as information at the January 22, 2024 board meeting.

Recommendation: The administration recommends approval of the attached minority business enterprise utilization plan.

Attachments — MBE Utilization Plan FY2023-2024

**SMALL AND MINORITY BUSINESS ENTERPRISE UTILIZATION PLAN****SCHOOL DISTRICT:** School District Five of Lexington and Richland Counties**ADDRESS:** 1020 Dutch Fork Road, Irmo, SC, 29063**SUPERINTENDANT:** Dr. Akil E. Ross, Sr.**PHONE:** (803) 476-8169**CONTACT PERSON:** Lynda Robinson**PHONE:** (803) 476-8140**TITLE:** Purchasing Coordinator**EMAIL:** lrobin@lexrich5.org**GOAL****TOTAL CONTROLLABLE DOLLARS:** \$8,282,576.66***GOAL FOR MBE (10% OF CONTROLLABLE DOLLARS):** \$828,257.67

Approved (please sign, print title and date)
Board Chair

Title

Date

*Estimated based on FY23 controllable dollars. See attachment for the definition of controllable dollars.

School District Five of Lexington and Richland Counties believes that it is in the best interest and long-term benefit of both the community and the District that a plan be established to ensure opportunities for participation by Small and Minority Businesses Enterprises. The policies set forth herein shall help to minimize the disparity between contract awards for goods and services to minority small businesses and non-minority businesses. The objectives of the plan are to assure that minority small business enterprises are afforded full opportunity to participate in all activities of the District's procurement program. To this end, the Administration is directed to establish objectives that are obtainable, empowering, and robust.

Guiding Principles:

- A. To ensure the maximum opportunity for qualified minority small businesses, in conformance with State laws and regulations, to participate in the procurement and award process for performance contracts in the School District.
- B. To regularly review, develop, and implement the adoption of such additional rules and standards to continuously achieve the District's goals; and
- C. To establish annual objectives and implementation measures for increased participation by minority small businesses.

I. Minority Business Enterprise Participation Goals

In order to foster effective broad-based competition for public procurement within the free enterprise system, the District's goal is to ensure the fair and equitable treatment of all persons who deal within the procurement system of the District. State-certified minority businesses will be solicited for participation in the overall procurement process of the District. Consistent with the directives of the District's Procurement Code adopted April 5, 2022, the District's goal is for a minimum of ten percent (10%) of the total controllable budget of all new expended offerings for the procurement of supplies, services, and construction contracts.

II. Definitions

The definitions utilized in this plan are contained in Section 11-35-5010 of the South Carolina Code of Laws, 2021 School District Model Code.

- A. "Minority Person" means a United States citizen who is economically and socially disadvantaged.
 - i. "Socially disadvantaged individuals" means those individuals who have been subject to racial or ethnic prejudice or cultural bias because of their identification as members of a certain group, without regard to their individual qualities. Such groups include, but are not limited to, Black Americans, Hispanic Americans, Native Americans (including American Indians, Eskimos, Aleuts and Native Hawaiians), Asian Pacific Americans, and other minorities to be designated by the Board of Education for the District.
 - ii. "Economically disadvantaged individuals" means those socially disadvantaged individuals whose ability to compete in the free enterprise system has been impaired due to diminished capital and credit opportunities as compared to others in the same business area who are not socially disadvantaged.

B. A “socially and economically disadvantaged small business” means any small business concern which:

- i. Is at least fifty-one percent owned by one or more citizens of the United States who are determined to be socially and economically disadvantaged.
- ii. In the case of a concern which is a corporation, fifty-one percent of all classes of voting stock of such corporation must be owned by an individual determined to be socially and economically disadvantaged.
- iii. In the case of a concern which is a partnership, fifty-one percent of the partnership interest must be owned by an individual or individuals determined to be socially and economically disadvantaged and whose management and daily business operations are controlled by individuals determined to be socially and economically disadvantaged. Such individuals must be involved in the daily management and operations of the business concerned.

III. Statement of Policy

As provided in Section 11-35-5210 of the South Carolina Code of Laws, the South Carolina General Assembly has declared that business firms owned and operated by minority persons have been historically restricted from full participation in our free enterprise system to a degree disproportionate to other businesses. The General Assembly believes that it is in the state’s best interests to assist minority-owned businesses to develop fully as a part of the state’s policies and programs which are designed to promote balanced economic and community growth throughout the State. The General Assembly therefore, wishes to ensure that those businesses owned and operated by minorities are afforded the opportunity to fully participate in the overall procurement process of the State. The General Assembly, therefore, takes this leadership role in setting procedures that will result in awarding contracts and subcontracts to minority business firms in order to enhance minority capital ownership, overall state economic development, and reduce dependency on the part of minorities.

It is the commitment of School District Five of Lexington and Richland Counties to use minority business enterprises in all aspects of procurement.

IV. State Certification

Businesses must be certified to determine the enterprise’s ownership by minorities based on the definitions in this plan. Any firm desiring to be certified as a minority firm shall submit an application to:

The Office of Small and Minority Business Assistance (OSMBA)
Division of Rural Development
Edgar A. Brown Building
1205 Pendleton Street, Suite 329,
Columbia, SC 29201
Telephone (803) 734-5044 | Fax (803) 734-4061

The MBE certification number issued by the South Carolina Division of Small and Minority Business Contracting and Certification (SMBCC) indicates both the minority classification code of the majority owner of the company and the expiration date of the certificate. Certifications are valid for a period of five years.

SMBCC entered into an agreement with the South Carolina Department of Transportation (SCDOT) in May 2012. Under this Memorandum of Understanding (MOU), businesses certified by SCDOT that meet SMBCC requirements may receive the SMBCC certification without going through an additional certification process.

The U.S. SBA has a separate application process and unique requirements. Certifications are not reciprocal.

V. Procurement Formats

All projects/contracts will be evaluated prior to bid, in accordance with the strategies included herein, to reduce the size and/or scope, determine exemptions, and foster open competition to meet the District's goals.

The various options for determining size/scope are:

- A. The full quantity of a given item(s) on a large contract may be placed on a separate contract for bidding.
- B. A partial quantity of a given item(s) on a large contract for bidding.
- C. The term of a contract may be shortened which results in a dual effect- the reduction of quantities required and risk inherent in guaranteeing prices over a longer time period.
- D. Work to be performed may be grouped according to geographic location and placed on separate contracts.
- E. Unrelated scopes of work to be performed or portions not requiring completion by a single bidder may be placed on separate contracts; and
- F. The Superintendent or his/her designee may select certain procurement opportunities for solicitation to minority business enterprises to achieve the goals of this plan. The procuring document will identify these opportunities as a "Designated for Disadvantaged Businesses Solicitation."

The reduction of projects will be based on the following criteria:

- A. The degree of complexity of the project's design for the purpose of reduction.
- B. The extent of the availability of minority business enterprises to participate, especially within a specific specialty or trade.
- C. The extent to which the goals are being met within any annual period; and
- D. The potential cost/benefits of reducing the project.

VI. Minority Business Enterprise Opportunity Notice and Preferences

The District's plan and goals will be passed onto all potential contracting entities prior to solicitation of actual price quotes on any opportunity through its advertisements, contract documents, and boilerplate specifications. Every proposal price quote and offering of any kind will include the name and identification of any MBE contractors and suppliers must be included as a part of the bid documentation. If this is not fully complied with, the proposal, price quote, and/or

offers will be materially insufficient and will be disqualified from any further consideration by the District.

On day-to-day operations all known certified MBEs will be solicited on a routine basis giving them an opportunity to bid on the District's requirements, not limiting MBEs to designated and small purchase contracts. The District shall solicit MBEs participation on all procurements requiring competition when there are MBE's available. A link to the directory of MBE's can be found on the District's website.

Tie Bids. If two or more bidders are tied in price while otherwise meeting all of the required conditions, awards are determined in the following order of priority:

- A. If there is a South Carolina firm tied with an out-of-state firm, the award must be made automatically to the South Carolina firm.
- B. Tie bids involving South Carolina produced or manufactured products, when known, and items produced or manufactured out of the State must be resolved in favor of the South Carolina commodity.
- C. **Tie bids involving a business certified by the South Carolina Office of Small and Minority Business Assistance as a Minority Business Enterprise must be resolved in favor of the Minority Business Enterprise.**
- D. Tie bids involving South Carolina firms must be resolved in favor of the South Carolina firm located in the District.
- E. In all other situations in which bids are tied, the award must be made to the tied bidder offering the quickest delivery time, or if the tied bidders have offered the same delivery time, the tie must be resolved by the flip of a coin witnessed by the procurement officer. All responding vendors must be invited to attend.

VII. District Assistance to Minority Small Business Enterprises

The District will provide various resources to accomplish the Minority Small Business Enterprises goal as follows:

- A. **Referral Service.** The District, in an effort to assist small and minority businesses, will maintain a reference file of Federal, State, and other organizations that aid small and minority businesses in organizational and business training. All reference information will be made available to minority firms who desire any assistance.
- B. **Split Projects.** The District also wishes to provide minority subcontractors an opportunity to bid on renovation projects that are coordinated in-house by the Maintenance Department. Contractors/Subcontractors who appear on the Minority Small Business Enterprises District active list maintained by the District will be sent invitations to bid on portions of the work for which they qualify.
- C. **Contractor and Subcontractor Requirements.** The District shall provide clear and timely instructions to contractors concerning the use of minority subcontractors as a part of the plan goals. Solicitations will require all bidders to address and meet the use of minority contractors and subcontractors in alignment with the goals specified.

- D. **Professional Services.** The District must procure all professional services in accordance with Article 9 of the District's procurement code. Contracts for construction related professional services with fees \$50,000 or less may be directly negotiated with a certified minority business. The District may direct a contract for construction related professional services with fees exceeding \$50,000 towards certified minority businesses. The District must include the following statement in the advertisement: "This is a designated contract directed towards certified South Carolina based minority firms to satisfy the minority business enterprise goal of the Agency. However, this does not prevent other firms from submitting resumes for consideration."
- E. **Construction.** The District may direct an entire construction contract towards certified minority businesses. The District must procure the contract in accordance with the requirements of the Procurement Code. If the procurement requires advertisement, then the District must include the following statement in the advertisement: "This is a designated contract directed towards certified South Carolina based minority firms to satisfy the MBE goals of the District. However, this does not prevent other firms from bidding on this project." B. The District may direct all bidders to address the use of certified minority businesses as subcontractors. The District shall provide specific instructions in the bid documents and the advertisement on how to comply with the requirement. The District may declare a bid non-responsive for failure to address the use of minority business Subcontractors as instructed.
- F. **Publications.** The District, to enhance the Minority Small Business Enterprises participation in the Capital Improvement Program of the District as well as all others, RFQs, RFPs, and goods and service offerings, shall advertise, and several organizations will be notified. Also, whenever possible, the District shall supply Minority Small Business Enterprises and organizations assisting Minority Small Business Enterprises with a list of projects and anticipated bid dates, to provide ample time to develop and complete bid packages, proposals, and obtain any other needed assistance.

Required Publication sites, at a minimum, include:

- South Carolina Business Opportunities (SCBO)
- The District's Website

VIII. Reporting Requirements

The Superintendent shall report bi-annually (each six-month fiscal period) in writing to the Board with the following information to demonstrate compliance with this plan:

- (a) number of minority firms solicited;
- (b) number of minority bids received;
- (c) total dollar amount of funds expended n contracts awarded to minority firms certified pursuant to Section 11-35-5230 of the South Carolina Code of Laws; and
- (d) total dollar amount of funds expended.

The Procurement Coordinator will be responsible for the oversight, preparation, and review of all contracts within the District to ensure that best business practices, management standards, legal requirements, and risk/insurance reviews are consistent in all documents emanating from the District to the public. In addition, the Procurement Coordinator, as the liaison designee, will work

with the Facilities Service Manager to lead, direct, and promote this minority business enterprises program throughout the district.

IX. Implementation

The Chief Procurement Officer shall implement this plan set forth in subsection (1) in accordance with the provisions of Section 5220 of the 2021 School District Model Procurement Code.

Minority Vendor Utilization

Controllable Dollars Definition

Section 11-35-5240 includes goals for spending with Minority Businesses of at least 10% of the District's total dollar amount of funds expended. "Total dollar amount of **funds** expended" is defined as the total dollar amount in which the District has discretion or influence in the selection of a private vendor. Following the State's guidance, expenditures in general ledger accounts for the following charges are excluded from the total dollar amount of funds expended.

Payroll	Dues and Memberships
Fringe	Insurance
Travel (Travel agency expenditures are included)	Medical Services-Professionals
Library Books	Medical Services-Institutions
Textbooks	Tuition
Postage	Fuel/Transportation
Utilities	Interest
Communication Services - Telephone	Payments to Governmental Entities
Cell Phone Service	Audit Fees
Freight, Express, Delivery	Data Processing Services
Motor Vehicles	Interest
Land	Petty Cash

Also, excluded are:

Payments to public entities,

Payments to vendors on Statewide and District contracts,

Payments to vendors based on a Sole Source justification,

Payments to vendors based on an Emergency justification,

Payments to vendors that have been competitively solicited.

Payments to entities for services or products in which there are no Small and Minority Business certified firms.



MEMORANDUM

To: Members of the Board of Trustees

Through: Dr. Akil E. Ross, Sr.
Superintendent

From: Tina McCaskill *TM*
Chief Academic Officer

Date: August 15, 2023

Re: August 21, 2023 Board Meeting
Action Item
First Reading of Potential Revisions to Board Policy IKACC "Placement of Non-Accredited Private and Home School Secondary Students"

Item: First Reading of Potential Revisions to Board Policy IKACC "Placement of Non-Accredited Private and Home School Secondary Students".

Background: AdvancED merged with Measured Progress in 2018 and the organization rebranded as Cognia in 2019. Cognia is a non-profit, non-governmental organization that accredits primary and secondary schools throughout the United States and Internationally. The proposed revision to this policy is to align terminology from out dated organization names to Cognia.

Recommendation: The administration recommends that the Board of Trustees approve the first reading of the potential revisions to Board Policy IKACC "Placement of Non-Accredited Private and Home School Secondary Students" and proceed to the second and final reading at the September 11, 2023 board meeting.

Attachments: Current Policy and Potential Revisions to Board Policy IKACC

Policy IKACC Placement Of Non-Accredited Private and Home School Secondary Students

Issued 1/15

Purpose: To establish the basic structure for placement of students from non-accredited private and/or home schools.

When enrolling students from home schools or private schools that are not accredited by the Southern Association of Colleges and Schools (SACS), secondary school administrators will adhere to the following guidelines.

- Check all course documentation and test scores that are presented from the private or home school and compare with similar courses offered in the district's high school(s). If a preponderance of the documentation reflects similarities with courses offered in district schools (title, course description, syllabi, assignments, assessments, etc.), the principal may award probationary credit for the course. In such case, the student will be tentatively assigned to classes for a probationary period. During this probationary period, the student will have to meet requirements (subject and state standards, satisfactory completion of designated assignments, etc.) determined by the principal or his/her designee before a decision is made granting class placement and/or Carnegie credit.
- End of the year exams will be administered for courses that are not justified by the review of the private and home school documentation. If the student successfully passes the end of the year exam(s), the student may be placed in the next grade on the level deemed appropriate by the principal or his/her designee based on the test results and review of documentation.
- The student is assigned a class rank, grades for the credited courses and a grade point average. Students will not receive honors or advanced placement weighting regarding the calculation of grade point averages.
- All requirements for graduation must be completed.
- For elective credit, documentation from the private or home school should be compared with the courses offered to determine if end of year testing is appropriate.
- Students from home schools or non-accredited private schools entering the ninth grade may not receive high school credit for courses that are not offered to District Five middle school students.
- Science courses with extensive labs may not be credited to the student unless there is substantial documentation of the same lab work done in the private or home school or the student passes the end of year test.

Adopted 6/11/01; Revised 2/25/13, 1/26/15

School District Five of Lexington and Richland Counties



Placement Of Non-Accredited Private and Home School Secondary Students

Code **IKACC** Issued **10/17 8/23**

Purpose: To establish the basic structure for placement of students from non-accredited private and/or home schools.

When enrolling students from home schools or private schools that are not accredited by ~~the Southern Association of Colleges and Schools (SACS)~~ Cognia, secondary school administrators will adhere to the following guidelines.

- Check all course documentation and test scores that are presented from the private or home school and compare with similar courses offered in the district's high school(s). If a preponderance of the documentation reflects similarities with courses offered in district schools (title, course description, syllabi, assignments, assessments, etc.), the principal may award probationary credit for the course. In such case, the student will be tentatively assigned to classes for a probationary period. During this probationary period, the student will have to meet requirements (subject and state standards, satisfactory completion of designated assignments, etc.) determined by the principal or his/her designee before a decision is made granting class placement and/or Carnegie credit.
- End of the year exams will be administered for courses that are not justified by the review of the private and home school documentation. If the student successfully passes the end of the year exam(s), the student may be placed in the next grade on the level deemed appropriate by the principal or his/her designee based on the test results and review of documentation.
- The student is assigned a class rank, grades for the credited courses and a grade point average. Students will not receive honors or advanced placement weighting regarding the calculation of grade point averages.
- All requirements for graduation must be completed.
- For elective credit, documentation from the private or home school should be compared with the courses offered to determine if end of year testing is appropriate.
- Students from home schools or non-accredited private schools entering the ninth grade may not receive high school credit for courses that are not offered to District Five middle school students.
- Science courses with extensive labs may not be credited to the student unless there is substantial documentation of the same lab work done in the private or home school or the student passes the end of year test.

Adopted 6/11/01; Revised 2/25/13, 1/26/15

**MEMORANDUM**

To: Members of the Board of Trustees

Through: Dr. Akil E. Ross, Sr.
Superintendent

From: Tina McCaskill *JMK*
Chief Academic Officer

Date: August 15, 2023

Re: August 21, 2023 Board Meeting
Action Item
First Reading of Potential Revisions to Board Policy IHCA "Summer School"

Item: First Reading of Potential Revisions to Board Policy IHCA "Summer School".

Background: AdvancED merged with Measured Progress in 2018 and the organization rebranded as Cognia in 2019. Cognia is a non-profit, non-governmental organization that accredits primary and secondary schools throughout the United States and Internationally. The proposed revisions to this policy are to align terminology from out dated organization names to Cognia. An additional proposed revision to Policy IHCA is to update language in regards to summer school. We no longer offer students the opportunity to take initial credit courses that require 120 hours of seat time during summer school. We offer credit recovery for students that have failed courses with a grade of 50 – 59 during the regular school year. Initial credit courses must be taken through VirtualSC during summer session.

Recommendation: The administration recommends that the Board of Trustees approve the first reading of the potential revisions to Board Policy IHCA "Summer School" and proceed to the second and final reading at the September 11, 2023 board meeting.

Attachments: Current Policy and Potential Revisions to Board Policy IHCA

Policy IHCA Summer School

Issued 10/17

Purpose: To establish the basic structure for summer instruction of students.

For the purpose of promotion, the district may offer a summer school program whenever there is enough interest by students and parents/legal guardians for such a program. The district will operate the summer program in accordance with State Board of Education regulations and standards required by the South Carolina Department of Education and the Southern Association of Colleges and Schools Council on Accreditation and School Improvement (AdvancED/SACS CASI). The instruction offered in the summer school program will meet the same rigor and standards required during the regular school year.

For grades one through eight, a school may promote students only for courses in summer school programs, either district-wide or school-site, that meet all regulatory requirements. For students in grades nine through 12, a school may award Carnegie units of credit only for courses in summer school programs, either district-wide or school-site, that meet all regulatory requirements. All students taking a course for one unit of credit must receive at least 120 hours of instruction in that subject area. Students may earn up to two credits during one summer school session. Additional credits may be earned with prior approval from the building level principal.

Schools will charge students a fee to cover the expenses of staffing, providing instructional materials and textbooks, and other expenses directly related to the instructional aspect of the summer school program.

Summer Reading Camp

Students who are significantly below third-grade reading proficiency at the end of third grade will be subject to mandatory retention under state law. These students will be provided the opportunity to attend a district-wide summer reading camp to receive intensive instructional services and support. The summer reading camp will offer students 96 additional hours of reading instruction, progress monitoring, and ongoing access to a school library/media center. Transportation will be provided at no cost to the student. The district may elect to invite students in other grade levels who are not progressing towards grade-level proficiency in reading to attend summer reading camp. Parents/legal guardians of eligible students will make the final decision on whether their -student will participate.

Students who successfully participate in a summer reading camp at the conclusion of the third grade year and demonstrate through either a reading portfolio or a norm-referenced, alternative assessment that their mastery of the state standards in reading is equal to at least a level above the lowest level on the state reading assessment, may be eligible for a good cause exemption from state-mandated third grade retention.

Cf. IG, IGCA, IHAK, IHAQ, IHBC, IKE, IKF, JLD, KB

Adopted 7/21/75; Revised 1/25/88, 4/22/96, 3/25/13, 5/8/17, 10/23/17

Legal References:

S.C. Code, 1976, as amended:

[Section 59-155](#)-110, *et seq.* - South Carolina Read to Succeed Act of 2014.

State Board of Education Regulations:

[R-43-231](#) - Defined program K-5.

[R-43-232](#) - Defined program 6-8

[R-43-234](#) - Defined program, grades 9-12.

[R-43-240](#) - Summer programs.

South Carolina Department of Education:

Intervention Guidance Document, Kindergarten through Grade Five (2017).

Read to Succeed Third Grade Retention Guidance Document, Fall 2016 (2016).

School District Five of Lexington and Richland Counties

Summer School

Code **IHCA** Issued **10/17 8/23**

Purpose: To establish the basic structure for summer instruction of students.

For the purpose of promotion, the district may offer a summer school program whenever there is enough interest by students and parents/legal guardians for such a program. The district will operate the summer program in accordance with State Board of Education regulations and standards required by the South Carolina Department of Education and ~~the Southern Association of Colleges and Schools Council on Accreditation and School Improvement (AdvancED/SACS CASI)~~ Cognia. The instruction offered in the summer school program will meet the same rigor and standards required during the regular school year.

For grades one through eight, a school may promote students only for courses in summer school programs, either district-wide or school-site, that meet all regulatory requirements. For students in grades nine through 12, a school may award Carnegie units of credit only for courses in summer school programs, either district-wide or school-site, that meet all regulatory requirements. ~~All students taking a course for one unit of credit must receive at least 120 hours of instruction in that subject area.~~ Students may earn up to two credits during one summer school session. Additional credits may be earned with prior approval from the building level principal.

Schools will charge students a fee to cover the expenses of staffing, providing instructional materials and textbooks, and other expenses directly related to the instructional aspect of the summer school program.

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Students who are significantly below third-grade reading proficiency at the end of third grade will be subject to mandatory retention under state law. These students will be provided the opportunity to attend a district-wide summer reading camp to receive intensive instructional services and support. The summer reading camp will offer students 96 additional hours of reading instruction, progress monitoring, and ongoing access to a school library/media center. Transportation will be provided at no cost to the student. The district may elect to invite students in other grade levels who are not progressing towards grade-level proficiency in reading to attend summer reading camp. Parents/legal guardians of eligible students will make the final decision on whether their student will participate.

Students who successfully participate in a summer reading camp at the conclusion of the third grade year and demonstrate through either a reading portfolio or a norm-referenced, alternative assessment that their mastery of the state standards in reading is equal to at least a level above the lowest level on the state reading assessment, may be eligible for a good cause exemption from state-mandated third grade retention.

Cf. IG, IGCA, IHAK, IHAQ, IHBC, IKE, IKF, JLD, KB

Adopted 7/21/75; Revised 1/25/88, 4/22/96, 3/25/13, 5/8/17, 10/23/17

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South Carolina Department of Education:

Intervention Guidance Document, Kindergarten through Grade Five (2017).

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School District Five of Lexington and Richland Counties

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MEMORANDUM

To: Members of the Board of Trustees

Through: Dr. Akil E. Ross, Sr.
Superintendent

From: Tina McCaskill *JMK*
Chief Academic Officer

Date: August 15, 2023

Re: August 21, 2023 Board Meeting
Action Item
First Reading of Potential Revisions to Board Policy IJNDAA "Distance, Online, and Virtual Education"

Item: First Reading of Potential Revisions to Board Policy IJNDAA "Distance, Online, and Virtual Education"

Background: The use of technology driven courses has increased for a variety of reasons and allows students in grades 7 - 12 to receive credit towards graduation as well as dual enrollment course work. The proposed revisions to this policy will allow VirtualSC courses to be counted as academic credits to be applied toward graduation requirements. Students enrolled in dual enrollment classes may desire to complete technology delivered courses that will count towards both high school and college credit hours.

Recommendation: The administration recommends that the Board of Trustees approve the first reading of the potential revisions to Board Policy IJNDAA "Distance, Online, and Virtual Education" and proceed to the second and final reading at the September 11, 2023 board meeting.

Attachments: Current Policy and Potential Revisions to Board Policy IJNDAA

DISTANCE, ONLINE, AND VIRTUAL EDUCATION

Code **IJNDAA** Issued **1/21**

Purpose: To establish the board's vision and the basic structure for providing technology-delivered courses as an alternative means of instruction for students.

The district will utilize technology-delivered courses as part of its educational program to increase accessibility and flexibility in the delivery of instruction in the district. In addition to regular, classroom-based instruction, students in the district may earn credit through accredited distance, online, or virtual learning courses operated through the district's program and/or the state-run South Carolina Virtual School Program.

District Courses

All technology-delivered programs and courses offered by the district will be consistent with state academic standards and instructional goals of the district, ensuring both the rigor of the course and the quality of instruction. The district will review instructional materials periodically to ensure they meet program standards.

The district will integrate technology-delivered instruction as part of the regular instruction provided by a certified teacher in the district for grades K through 12.

Grades seven and eight

Students in grades seven and eight may earn academic credit to be applied toward graduation requirements by completing technology-delivered courses offered through agencies approved by the board.

A middle school student may earn credit for a distance, online, or virtual learning course under the following circumstances:

- The middle school does not offer the course due to lack of certified personnel.
- The middle school does offer the course, but the student is unable to take it due to an unavoidable scheduling conflict.
- The course will serve as a supplement to extended homebound instruction.
- The district has expelled the student from the regular school setting, but educational services are to be continued.
- The principal, with agreement from the student's parent/legal guardian and teachers, determines the student requires a differentiated or accelerated learning environment.

The school must receive an official record of the final grade before awarding credit toward graduation.

Grades nine through 12

Students in grades nine through 12 may earn a maximum of 12 units of academic credit to be applied toward graduation requirements by completing technology-delivered courses offered through agencies approved by the board.

PAGE 2 - IJNDAA - DISTANCE, ONLINE, AND VIRTUAL EDUCATION

A student may earn credit for a distance, online, or virtual learning course under the following circumstances:

- The high school does not offer the course due to lack of certified personnel.
- The high school does offer the course, but the student is unable to take it due to an unavoidable scheduling conflict.
- The course will serve as a supplement to extended homebound instruction.
- The district has expelled the student from the regular school setting, but educational services are to be continued.
- The principal, with agreement from the student's parent/legal guardian and teachers, determines the student requires a differentiated or accelerated learning environment.
- The student needs the course for credit recovery.
- The student needs the course to meet graduation requirements.

The school must receive an official record of the final grade before awarding credit toward graduation.

Application for courses

Students applying for permission to take a technology-delivered course must do the following:

- Submit parent approval to the principal or his/her designee.
- Complete prerequisites and provide teacher/counselor recommendations to confirm that he/she possesses the maturity level needed to function effectively in a distance, online, or virtual learning environment.
- Obtain the approval of the principal or his/her designee before enrolling in a technology-delivered course.
- Adhere to the district code of conduct to include rules of behavior, consequences for violations, and signed student agreements.
- Adhere to attendance requirements of the district.

District review committee

The chief instructional officer will establish a committee to review all technology-delivered courses prior to use by the district.

Evaluation

The district will evaluate the educational effectiveness of the technology-delivered courses and the teaching/learning process to include assessments based on state academic standards. The district will use this evaluation to decide whether to grant credit for the course or to continue or discontinue the use of the technology-delivered course.

PAGE 3 - IJNDAA - DISTANCE, ONLINE, AND VIRTUAL EDUCATION

The school will be responsible for providing applicable in-school supervision and monitoring of students enrolled in the district technology-delivered courses.

South Carolina Virtual School Program

Students must have permission from the principal or his/her designee to be enrolled in the South Carolina Virtual School Program.

The high school principal may allow three online courses, with VirtualSC program courses, to be included in the three courses during each school year for grades nine through 12.

The district will transcribe the student's final numeric grade to the student's permanent grade and transcript.

Students enrolled in these courses will take final exams and appropriate state assessments in a proctored environment.

Nothing in state law requires the district to provide either home computer equipment or Internet access to a student enrolling in this program.

Cf. IHBG, IHBH

Adopted 6/16/13; Revised 10/23/17, 1/25/21

Legal References:

- A. S.C. Code of Laws, 1976, as amended:
 - 1. Section 59-16-10, *et seq.* - South Carolina Virtual School Program.
- B. S.C. State Board of Education Regulations:
 - 1. R43-248 - Virtual education program.

DISTANCE, ONLINE, AND VIRTUAL EDUCATION

Code **IJNDAA** Issued **1/21 8/23**

Purpose: To establish the board's vision and the basic structure for providing technology-delivered courses as an alternative means of instruction for students.

The district will utilize technology-delivered courses as part of its educational program to increase accessibility and flexibility in the delivery of instruction in the district. In addition to regular, classroom-based instruction, students in the district may earn credit through accredited distance, online, or virtual learning courses operated through the district's program and/or the state-run South Carolina Virtual School Program.

District Courses

All technology-delivered programs and courses offered by the district will be consistent with state academic standards and instructional goals of the district, ensuring both the rigor of the course and the quality of instruction. The district will review instructional materials periodically to ensure they meet program standards.

The district will integrate technology-delivered instruction as part of the regular instruction provided by a certified teacher in the district for grades K through 12.

Grades seven and eight

Students in grades seven and eight may earn academic credit to be applied toward graduation requirements by completing technology-delivered courses offered through agencies approved by the board.

A middle school student may earn credit for a distance, online, or virtual learning course ~~under if~~ **one or more of** the following circumstances ~~exist and is in alignment with SC regulation 43-232:~~

- The middle school does not offer the course due to lack of certified personnel.
- The middle school does offer the course, but the student is unable to take it due to an unavoidable scheduling conflict.
- The course will serve as a supplement to extended homebound instruction.
- The district has expelled the student from the regular school setting, but educational services are to be continued.
- The principal, with agreement from the student's parent/legal guardian and teachers, determines the student requires a differentiated or accelerated learning environment.

The school must receive an official record of the final grade before awarding credit toward graduation.

Grades nine through 12

Students in grades nine through 12 may earn ~~a maximum of 12 units of~~ academic credit to be applied toward graduation requirements by completing technology-delivered courses offered through agencies approved by the board.

PAGE 2 - IJNDAA - DISTANCE, ONLINE, AND VIRTUAL EDUCATION

A student may earn credit for a distance, online, or virtual learning course ~~under~~ if one or more of the following circumstances exist:

- The high school does not offer the course due to lack of certified personnel.
- The high school does offer the course, but the student is unable to take it due to an unavoidable scheduling conflict.
- The course will serve as a supplement to extended homebound instruction.
- The district has expelled the student from the regular school setting, but educational services are to be continued.
- The principal, with agreement from the student's parent/legal guardian and teachers, determines the student requires a differentiated or accelerated learning environment.
- The student needs the course for credit recovery.
- The student needs the course to meet graduation requirements.

The school must receive an official record of the final grade before awarding credit toward graduation.

Application for courses

Students applying for permission to take a technology-delivered course must do the following:

- Submit parent approval to the principal or his/her designee.
- Complete prerequisites and provide teacher/counselor recommendations to confirm that he/she possesses the maturity level needed to function effectively in a distance, online, or virtual learning environment.
- Obtain the approval of the principal or his/her designee before enrolling in a technology-delivered course.
- Adhere to the district code of conduct to include rules of behavior, consequences for violations, and signed student agreements.
- Adhere to attendance requirements of the district.

District review committee

The chief ~~instructional~~ academic officer will establish a committee to review all technology-delivered courses prior to use by the district.

Evaluation

The district will evaluate the educational effectiveness of the technology-delivered courses and the teaching/learning process to include assessments based on state academic standards. The district will use this evaluation to decide whether to grant credit for the course or to continue or discontinue the use of the technology-delivered course.

PAGE 3 - IJNDAA - DISTANCE, ONLINE, AND VIRTUAL EDUCATION

The school will be responsible for providing applicable in-school supervision and monitoring of students enrolled in the district technology-delivered courses.

South Carolina Virtual School Program (VirtualSC)

Students must have permission from the principal or his/her designee to be enrolled in the South Carolina Virtual School Program.

The high school principal may allow ~~three VirtualSC online courses, with VirtualSC program courses, to be included in the three courses~~ during each school year for grades nine through 12.

The district will transcribe the student's final numeric grade to the student's permanent grade and transcript.

Students enrolled in these courses will take final exams and appropriate state assessments in a proctored environment.

Nothing in state law requires the district to provide either home computer equipment or Internet access to a student enrolling in this program.

Cf. IHBG, IHBH

Adopted 6/16/13; Revised 10/23/17, 1/25/21

Legal References:

- A. S.C. Code of Laws, 1976, as amended:
 - 1. Section 59-16-10, *et seq.* - South Carolina Virtual School Program.
- B. S.C. State Board of Education Regulations:
 - 1. R43-248 - Virtual education program.

**MEMORANDUM**

To: Members of the Board of Trustees

Through: Dr. Akil E. Ross, Sr.
Superintendent

From: Tina McCaskill *TM*
Chief Academic Officer

Date: August 15, 2023

Re: August 21, 2023 Board Meeting
Action Item
First Reading of Potential Revisions to Board Policy IKG "Secondary Education"

Item: First Reading of Potential Revisions to Board Policy IKG "Secondary Education"

Background: The term "guidance counselor" has evolved to "school counselor" as the scope of duties has changed. Although some states still used the outdated "guidance counselor" term, the American School Counselor Association encourages the use of "school counselor" to more accurately reflect the role. Proposed revisions will change the term guidance counselor to school counselor where it is listed in the policy.

Another proposed revision is to replace the name of an accreditation agency with nonspecific language so future changes will not need to be made as the name of agencies change.

The current policy also states that students who complete the regular high school program in a subject area may enroll concurrently in high school and college courses as long as course load requirements are met. It also states that approval from the principal is required and all fees associated with the courses will be borne by the student or parent. Additionally, the policy limits the number of college courses that would be accepted towards high school diploma requirements and prohibits college courses from being substituted for courses of similar content in the high school's curriculum. Proposed revisions remove the mandate that course load requirements for a subject are completed before a student is allowed to take college courses in that area, allows a principal's designee to also provide approval for college courses, explains that fees incurred are the responsibility of the parent unless otherwise indicated by the district (implying certain fees may be incurred by the school), removes the limit on the

number of college courses that can be used towards a high school diploma, and allows courses, when applicable, to be substituted for courses of similar content in the high school's curriculum.

Recommendation: The administration recommends that the Board of Trustees approve the first reading of the potential revisions to Board Policy IKG "Secondary Education" and proceed to the second and final reading at the September 11, 2023 board meeting.

Attachments: Current Policy and Potential Revisions to Board Policy IKG

Policy IKG Secondary Education

Issued 3/17

Purpose: To establish the basic structure for the educational program for secondary students.

Because of its commitment to academic excellence, the board adopts the following provisions to assure maximum educational opportunities for secondary students.

Course of Study

All students in grades nine through 11 will enroll in at least eight classes, seven of which are credit bearing courses. Students classified as seniors must enroll in at least six credit bearing courses. The course of study for students with disabilities who are not working toward a high school diploma will be determined by the IEP committee.

Extended Studies Diploma

Students are to be encouraged to elect a program of study that will prepare them for success in college and satisfy recommendations of the South Carolina State Board of Education. An optional School District Five diploma will be awarded to those students who pursue an extended program of studies to include completion of at least 28 Carnegie units of credit as listed below and a community service project each year in grades nine through 12. Guidance counselors will be responsible for approving community service projects.

- four units of English
- at least four units of mathematics including Algebra I, Algebra II, and Geometry
- at least four units of laboratory science
- at least three units in the same foreign language
- four units in social studies including U.S. History, American Government/Economics, and two others
- one unit of computer technology, including satisfaction of a technology proficiency requirement
- one unit of physical education or JROTC
- one unit in occupational education or one unit in visual and/or performing arts
- additional electives selected by the student

Concurrent College Enrollment

Students who complete the regular high school program in a subject area may enroll concurrently in high school and college courses as long as course load requirements are met. The high school's master schedule will not be altered to accommodate the student seeking concurrent enrollment. Approval will be obtained from the principal prior to enrollment in the college course(s). All expenses incurred by participation in such courses will be borne by the student or parent/legal guardian.

As many as four Carnegie units for college courses may be earned and applied to the 24 units required for a state high school diploma by students in grades nine through 12 and/or adult education programs. A three-semester hour college course will transfer as 1.0 Carnegie unit. Only courses

applicable to baccalaureate degrees, or to associate degrees, offered by institutions in the state which are accredited by the Commission of Colleges of the Southern Association of Colleges and Schools may be accepted for credit. Units earned for college courses may not be substituted for courses of similar content offered in the high school's curriculum.

Early Dismissal/Late Arrivals

There will be no permanent late arrivals or early dismissals except those approved by a special committee at each school. Exceptions will be typically limited to students involved in school sponsored work-study programs, those enrolled in college courses, and those involved in committee-approved apprenticeships, mentorships, and/or internships.

Recognition Program

Honor graduates will be recognized by each high school at graduation. Honor graduates are students who rank in the top 15 percent of the class or earn a 4.0 with a cumulative grade point average or above as defined by the state uniform grading scale. The top five percent of students in a graduating class will be designated as distinguished honor graduates. The speakers for the commencement exercises (chosen from the distinguished honor graduates) will be selected by a committee of the distinguished honor graduates and teachers at each school.

The student must be enrolled for a minimum of one semester immediately preceding his/her graduation to be considered for recognition as an honor or distinguished honor graduate.

Units earned in a summer school program do not satisfy this requirement.

Cf. IKF

Adopted 6/16/86; Revised 1/25/88, 2/6/89, 1/8/96, 4/3/00, 5/19/03, 11/19/12, 3/13/17

School District Five of Lexington and Richland Counties

Proposed Revisions to Policy

Policy IKG Secondary Education

Issued ~~3/17~~ 7/23

Purpose: To establish the basic structure for the educational program for secondary students.

Because of its commitment to academic excellence, the board adopts the following provisions to assure maximum educational opportunities for secondary students.

Course of Study

All students in grades nine through 11 will enroll in at least eight classes, seven of which are credit bearing courses. Students classified as seniors must enroll in at least six credit bearing courses. The course of study for students with disabilities who are not working toward a high school diploma will be determined by the IEP committee.

Extended Studies Diploma

Students are to be encouraged to elect a program of study that will prepare them for success in college and satisfy recommendations of the South Carolina State Board of Education. An optional School District Five diploma will be awarded to those students who pursue an extended program of studies to include completion of at least 28 Carnegie units of credit as listed below and a community service project each year in grades nine through 12. ~~Guidance counselors~~ **School Counselors** will be responsible for approving community service projects.

- four units of English
- at least four units of mathematics including Algebra I, Algebra II, and Geometry
- at least four units of laboratory science
- at least three units in the same foreign language
- four units in social studies including U.S. History, American Government/Economics, and two others
- one unit of computer technology, including satisfaction of a technology proficiency requirement
- one unit of physical education or JROTC
- one unit in occupational education or one unit in visual and/or performing arts
- additional electives selected by the student

Concurrent College Enrollment

Students who complete the regular high school program in a subject area may enroll concurrently in high school and college courses ~~as long as course load requirements are met~~. The high school's master schedule will not be altered to accommodate the student seeking concurrent enrollment.

Approval will be obtained from the principal ~~or the principal's designee~~ prior to enrollment in the college course(s). All expenses incurred by participation in such courses will be borne by the student or parent/legal guardian ~~unless otherwise indicated by the district~~.

~~As many as four~~ Carnegie units for college courses may be earned and applied to the 24 units required for a state high school diploma by students in grades nine through 12 and/or adult education programs. **3**

A three-semester hour college course will transfer as 1.0 Carnegie unit. Only courses applicable to baccalaureate degrees, or to associate degrees, offered by institutions accredited by the board of education of that in the state ~~which are accredited by~~ or the appropriate regional accrediting agency ~~Commission of Colleges of the Southern Association of Colleges and Schools may be accepted for credit~~ qualify. ~~Units earned for college courses may not be substituted for courses of similar content offered in the high school's curriculum.~~

Early Dismissal/Late Arrivals

There will be no permanent late arrivals or early dismissals except those approved by a special committee at each school. Exceptions will be typically limited to students involved in school sponsored work-study programs, those enrolled in college courses, and those involved in committee-approved apprenticeships, mentorships, and/or internships.

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Honor graduates will be recognized by each high school at graduation. Honor graduates are students who rank in the top 15 percent of the class or earn a 4.0 with a cumulative grade point average or above as defined by the state uniform grading scale. The top five percent of students in a graduating class will be designated as distinguished honor graduates. The speakers for the commencement exercises (chosen from the distinguished honor graduates) will be selected by a committee of the distinguished honor graduates and teachers at each school.

The student must be enrolled for a minimum of one semester immediately preceding his/her graduation to be considered for recognition as an honor or distinguished honor graduate.

Units earned in a summer school program do not satisfy this requirement.

Cf. IKF

Adopted 6/16/86; Revised 1/25/88, 2/6/89, 1/8/96, 4/3/00, 5/19/03, 11/19/12, 3/13/17

School District Five of Lexington and Richland Counties

4



MEMORANDUM

To: Members of the Board of Trustees

Through: Dr. Akil E. Ross, Sr.
Superintendent

From: Tina McCaskill *TM*
Chief Academic Officer

Date: August 15, 2023

Re: August 21, 2023 Board Meeting
Action Item
First Reading of Potential Revisions to Board Policy IKD "Honor Roll"

Item: First Reading of Potential Revisions to Board Policy IKD "Honor Roll"

Background: A student must maintain an average of 90 in each subject in order to be eligible for A honor roll and a minimum of 80 in each course for B honor roll, in the six or more courses in which he or she is enrolled. Students enrolled in dual enrollment courses may be listed as taking less than six classes in PowerSchool as grades for courses offered through our college course partner (Midlands Technical College) will not be reported until the end of the semester. The proposed revision clarifies that dual enrollment courses are considered part of the six required blocks.

Recommendation: The administration recommends that the Board of Trustees approve the first reading of the potential revisions to Board Policy IKD "Honor Roll" and proceed to the second and final reading at the September 11, 2023 board meeting.

Attachments: Current Policy and Potential Revisions to Board Policy IKD

HONOR ROLLS

Code **IKD** Issued **1/17**

Purpose: To establish the board's vision for publication of student honor rolls.

The board encourages and fosters the development of intellectual student ability, desirable traits of character, and qualities of leadership. The board will support programs which recognize outstanding student achievement far in excess of minimum requirements in these areas. These programs may include honor rolls, honor societies, special awards, or special recognition at honors programs and/or commencement exercises.

The board directs the certified staff to develop criteria and procedures for these recognition programs in honor of scholarship or distinguished service by students in any school activity. The criteria and procedures will make clear the relationship between the honor and the relevant goal or goals of the schools.

A student must maintain a minimum average of 90 in each subject for which he/she is enrolled in order to be eligible for the A Honor Roll. A student must maintain a minimum average of 80 in each subject for which he/she is enrolled in order to be eligible for the A/B Honor Roll. No student who is enrolled for fewer than six blocks is eligible for the honor roll.

Honor Graduates

A senior student will be considered a high school honor graduate if he/she ranks in the top 15 percent of the class or earns a 4.0 cumulative GPA or above as defined in the state uniform grading scale policy. This cumulative grade point average is determined by including all grades in all subjects and is computed at the end of the 10th, 11th, and 12th grades. Distinguished honor graduates will be defined as the top five percent of the senior class as determined by the cumulative grade point average.

Adopted 1973; Revised 11/16/81, 5/19/03, 6/17/13, 4/22/15, 1/23/17

HONOR ROLLS

Code **IKD** Issued **~~4/17~~ 8/23**

Purpose: To establish the board's vision for publication of student honor rolls.

The board encourages and fosters the development of intellectual student ability, desirable traits of character, and qualities of leadership. The board will support programs which recognize outstanding student achievement far in excess of minimum requirements in these areas. These programs may include honor rolls, honor societies, special awards, or special recognition at honors programs and/or commencement exercises.

The board directs the certified staff to develop criteria and procedures for these recognition programs in honor of scholarship or distinguished service by students in any school activity. The criteria and procedures will make clear the relationship between the honor and the relevant goal or goals of the schools.

A student must maintain a minimum average of 90 in each subject for which he/she is enrolled in order to be eligible for the A Honor Roll. A student must maintain a minimum average of 80 in each subject for which he/she is enrolled in order to be eligible for the A/B Honor Roll. No student who is enrolled for fewer than six blocks is eligible for the honor roll **unless enrolled in dual credit courses during that term.**

Honor Graduates

A senior student will be considered a high school honor graduate if he/she ranks in the top 15 percent of the class or earns a 4.0 cumulative GPA or above as defined in the state uniform grading scale policy. This cumulative grade point average is determined by including all grades in all subjects and is computed at the end of the 10th, 11th, and 12th grades. Distinguished honor graduates will be defined as the top five percent of the senior class as determined by the cumulative grade point average.

Adopted 1973; Revised 11/16/81, 5/19/03, 6/17/13, 4/22/15, 1/23/17

Office of the State Inspector General

Brian D. Lamkin



Review of Project Management and Internal Controls – Piney Woods Elementary School Construction School District Five of Lexington & Richland Counties

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[Appendix A](#) South Carolina Governor Henry McMaster, Request Letter dated 1/17/23

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Introduction

The South Carolina Office of the State Inspector General (SIG) was established by the South Carolina General Assembly in 2012 (Act No. 105) for the purpose of investigating and addressing allegations of fraud, waste, abuse, mismanagement, misconduct in agencies, specifically the executive branch of state government. The SIG's authorities are found in [South Carolina Code of Laws, §1-6-10 et seq.](#)

In 2022, the South Carolina General Assembly passed S. 202 (Act No. 223) which expanded the SIG's authority, with limitations (§1-6-35), to investigate public schools and school districts, public charter schools and authorizers, and voluntary associations that establish and enforce bylaws or rules for interscholastic sports competition for public secondary schools.

The purpose of this report is to provide a road map for the School District Five of Lexington & Richland Counties' (District) leadership and Board of Trustees (Board) to improve in its delivery of quality education to its students in a unified effort. This investigation focused specifically on procurement matters related to the Piney Woods Elementary School construction and the District's overall project management.

The SIG extends its appreciation to Dr. Akil Ross, District staff and Board members for their cooperation, providing access to documents and business records, and their intentionality of seeking solutions to the issues identified by the SIG. The SIG also extends its appreciation to current and former teachers, administrators, Board members and contractors for the valuable input and access to supporting documentation provided to the SIG during this investigation.

I. Background

A. Predicate

At the request of the Board of Trustees for School District Five of Lexington & Richland Counties (District), South Carolina Governor Henry McMaster, by letter dated 1/17/23, requested the Office of the State Inspector General (SIG) to initiate and conduct a review or investigation of the District's procurement-related issues associated with the Piney Woods Elementary School (PWES) construction project pursuant to South Carolina Code of Laws, §1-6-35. In addition, the request provided for the SIG to initiate and conduct a review or investigation of any different or additional allegations of fraud, waste, abuse, mismanagement, misconduct, violations of state or federal law, or wrongdoing as the SIG deemed appropriate. (See [Appendix A](#))

B. Scope and Objectives

The scope and objectives of this limited review examined contractor billing, actions of the procurement selection committee, the District's compliance with its procurement code, and contractor-related transactions in light of the issues described below regarding the PWES construction project:

- Internal controls over contractor billing and unexplained discrepancies in invoices, payments, and contingency allowances;
- Internal controls over the procurement selection committee;
- Potential conflicts of interest between or among the procurement selection committee members, the general contractor or subcontractors;
- Potential violations of the District's procurement code or policy; and
- Compliance with the "agreed upon procedures" for school district procurement audits as approved by the Division of Procurement Services, State Fiscal Accountability Authority.

C. Methodology

The SIG reviewed relevant documentation, including emails, provided by the District, and applicable state and federal laws, regulations, and policies. The SIG conducted interviews of current and former District leadership, trustees, employees, representatives, project managers, and contractors for the PWES project, as well as the state's Division of Procurement Services, the Office of State Engineer officials, the South Carolina Department of Education (SCDE) officials, the Office of the State Auditor, the State Ethics Commission, external auditors that provided audit services to the District, and other persons associated with the PWES project.

Reviews and investigations by the SIG are conducted in accordance with professional standards set forth by the Association of Inspectors General's *Principles and Standards for Offices of Inspector General*, often referred to as the "Green Book." This investigation used the preponderance of evidence standard.

D. School District Five of Lexington & Richland Counties

The District serves an enrollment of approximately 17,000 students. The District has thirteen elementary schools, two intermediate schools, three middle schools, four high schools, a career and technology center, one Center for Advanced Technical Studies and one alternative school. Currently, the District employs a full-time equivalent professional staff of approximately 2,500 employees.

E. Board of Trustees

A seven-member Board of Trustees (Board) governed the District and had fiscal autonomy to approve and administer the District's budget. The Board operated in accordance with the [SC Code of Laws Section 59-19-](#)

[90](#) as referenced in the District's Board policy [BBA Board Powers and Duties](#). The District trustees and superintendents for the period of this review are depicted in Table A.

Table A

Trustees Nov. 2016 - Nov. 2018	Trustees Nov. 2018 - Nov. 2020	Trustees Nov. 2020 - Nov. 2022
Mr. Robert Gantt (chair)	Mr. Robert Gantt (chair) resigned chair position 2/20*	Mrs. Jan Hammond (chair)
Mrs. Jan Hammond	Mrs. Jan Hammond	Mrs. Catherine Huddle
Ms. Beth Hutchison	Ms. Beth Hutchison	Mrs. Rebecca Blackburn Hines
Mrs. Ellen Baumgardner	Mr. Ken Loveless	Mr. Ken Loveless
Mr. Larry Haltiwanger	Mrs. Nikki Gardner	Mrs. Nikki Gardner
Mr. Ed White	Mr. Ed White	Mr. Matt Hogan
Mr. Michael Cates	Mr. Michael Cates *served as chair 3/20-11/20	Mr. Ed White resigned 6/21, replaced by Tifani Moore 11/21
Superintendent Dr. Stephen Hefner thru 6/18 Dr. Christina Melton 7/18	Superintendent Dr. Christina Melton	Superintendent Dr. Christina Melton thru 6/21 Dr. Akil Ross. Sr. interim until 1/22

II. Piney Woods Elementary School Contract Management

The SIG reviewed various contract documents related to the PWES construction project, contract requirements and conditions, payment requirements, and payment/support documents. The review identified deficiencies in contract management, including lack of contract oversight and questioned disbursements. An example of a lack of contract oversight involved a contractor related-party matter, which was identified at the outset of the contract but remained unaddressed by the contract management staff and legal counsel. The PWES contract management is more fully discussed below.

A. Summary of Piney Woods Elementary School Contracts

On 5/3/18, the District issued a Request for Qualifications (RFQ) for architectural design and engineering services ([Solicitation #2018-044](#)) to design Elementary School #13 (ES-13) on the Amicks Ferry Road property. On [7/16/18](#), the Board unanimously approved the selection (7–0 vote) of Quackenbush Architects + Planners, LLC (Quackenbush) as the architectural design professional for the project. On 12/18/18, the District executed a contract with Quackenbush.

On 8/9/18, the District issued an RFQ/Request for Proposals (RFP) for Construction Manager [sic] at Risk (CMAR) Services for ES-13 ([Solicitation #2019-007](#)). On [12/10/18](#), the Board approved the selection (5–2 vote) of Contract Construction, Inc. (CCI). On 12/19/18, the District executed a contract with CCI to be the CMAR for ES-13, subsequently named the Piney Woods Elementary School. The guaranteed maximum price, after amendments, was \$26,569,355, which was below the bond cap of \$30,000,000 set by the Board.

The Office of School Facilities (OSF), SCDE reviewed the design development and construction plans, conducted in-process and final inspections based on applicable building codes, and issued a [certificate of occupancy](#) to the District on 7/30/21.

B. Construction Management at Risk (CMAR) Services Contract

The District utilized the CMAR delivery method for the construction of the PWES. The South Carolina Consolidated Procurement Code of the [South Carolina Code of Laws, §11-35-2910 \(5\)](#) defined CMAR as:

“...a project delivery method in which the governmental body awards separate contracts, one for architectural and engineering services to design an infrastructure facility and the second to a construction manager at-risk for both construction of the infrastructure facility according to the design and construction management services.”

The Associated General Contractors of America described the CMAR method as:

“Under a CM-at-Risk contract, the Agency engages a project Designer and qualified CM under a negotiated contract to provide both preconstruction services and the construction of the project with a fixed fee and Guaranteed Maximum Price (“GMP”).... CM-at-Risk allows for the early project involvement of a CM who can partner with the A/E and Agency to provide constructability assistance, estimating, design review and early procurement opportunities. Additionally, the start of construction can begin prior to 100% complete design documents. The CM at-Risk typically also provides detailed cost estimates early in the design phase, so that value engineering and cost reduction ideas can be considered when they are the most easily addressed.”¹

On 12/19/18, the District and CCI executed [American Institute of Architects \(AIA\) Document A133-2009](#) “Standard Form of Agreement Between Owner and Construction Manager as Constructor” for the PWES construction project. This established the basis of payment as the cost of work plus a fee with a “Guaranteed Maximum Price (GMP).”

The award included a pre-construction services fee of \$50,000 and a construction management fee of 3.85% of the GMP. The total GMP of the District/CCI contract was \$26,569,355. General conditions of the CCI contract are detailed in the [AIA Document A201-2007](#), “General Conditions of the Contract for Construction,” and Amendment 1, and Amendment 2.

The Sitework Guaranteed Maximum Price (SGMP) Amendment included the cost of work and the construction manager’s fee of \$3,656,858. The Building Guaranteed Maximum Price (BGMP) Amendment included the cost of work and the construction manager’s fee of \$22,862,497, District-accepted enhancements of \$542,842, and substantial completion of work by 5/31/21, with final completion of work 60 days later. On 1/27/22, CCI returned \$369,467.25 in savings to the District, which reduced the final outlay/cost to the District to \$26,199,887.75, as set forth in Table B.

Table B

Summary of CCI CMAR Contract Reconciliation	
Pre-construction services fee	\$50,000.00
Amendment 1 SGMP	\$3,656,858.00
Amendment 2 BGMP	\$22,862,497.00
Contractual GMP	\$26,569,355.00
Funds Returned to the District	\$369,467.25
Final Outlay by the District	\$26,199,887.75

¹ [“Construction Management at Risk Benefits, Criteria and Justification Criteria,”](#) Associated General Contractors of America and National Association of State Facilities Administrators, June 2020, p.8.

On 9/27/22, CCI also returned \$14,868.62 with interest based on the \$369,467.25 reduction of the GMP in the construction manager's fee.

C. Billing Exceptions Identified by the SIG

Billing to the District was documented in the Contractor's Application for Payment (pay app), an AIA form² commonly used in the construction industry. The form contained the contractor's application for payment, a change order summary, certifications by both the contractor and the architect, and detailed costs. Each pay app contained a monthly Schedule of Values (SOV) Update and Job Cost Breakdown, and periodically contained a Contingency Accounting Activity Log.

During the contract delivery period, the District received 26 pay apps totaling \$26,199,887.75 that included \$963,020 for the construction management fee based on 3.85% of the GMP. The final adjustment of [\\$1,013,164](#) within the GMP on pay app #26 resulted in the contingency balance of \$369,467.25 returned to the District on 1/27/22.

An initial examination and assessment of the District's PWES records identified exceptions to sound contract management that resulted in \$418,556.38 of questioned disbursements. At the SIG's request, the current chief financial officer (CFO) identified and analyzed existing District documentation that satisfied \$21,855.73 of the foregoing amount, resulting in questioned disbursements of \$396,700.65. The documentation identified by the CFO was available to the PWES contract management team during the construction of the school. A subsequent SIG review of supporting documentation provided by CCI identified sufficient documentation that reduced the final total of questioned disbursements to \$38,362.69, which is more fully described below.

Unsupported Payment of Travel Expenses

For 18 of the 26 pay apps, the District paid \$20,088.58 to CCI for fuel, travel and phone costs, and per diem travel expenses for the project manager and supervisor without proper supporting travel expense reports or documentation.

Best practices for internal controls require that all travel documents should be signed and approved. In addition, a credit for "Fuel & Travel" was applied in pay app #20 for \$3,304.95 with no documentation or explanation referenced. Set forth in Table C is the summary detail of unsupported fuel and travel/per diem expenses.

Table C

Item Code & Description		Expense
1210	Fuel & Travel	\$20,627.86
1212	Per Diem Expense	\$2,765.67
Total		\$23,393.53
1210	Fuel & Travel [pay app #20]	(\$3,304.95)
Total Net		\$20,088.58

Lack of Invoices in Support of Payments

The District made 14 payments totaling \$1,939.50 without sufficient supporting invoice documentation for vendors as set forth in Table D.

² AIA Document G702™- 1992. Section 9.3.1.3 provided, "...Each Application for Payment shall be accompanied by all information and materials required to comply with the requirements of the contract... or reasonably requested by the Owner or the Architect."

Table D

Code	Subcontractor	Total	Invoices
1552	Carolina Connect Internet	\$956.74	11
1209	Lowes	\$982.76	3
	Total Payments	\$1,939.50	14

Incorrect Billing

The SIG determined that eight of the 70 invoices provided by CCI for services rendered by Owens Cleaning Services, reflected hours billed for various hourly rates were incorrect, as shown in Table E.

Table E

Pay App	Invoice #	Invoiced Amount	Corrected Amount	Variance	Explanation
14	26	\$6,350	\$6,728	(\$378)	underbilled
17	38	\$6,870	\$6,278	\$592	overbilled
17	40	\$5,910	\$6,062	(\$152)	underbilled
17	41	\$5,716	\$5,868	(\$152)	underbilled
19	42	\$6,816	\$7,024	(\$208)	underbilled
19	43	\$7,468	\$7,688	(\$220)	Underbilled
22	55	\$5,168	\$5,344	(\$176)	Underbilled
23	69	\$1,701	\$1,627	\$74	Overbilled
Total Charged		\$45,999	\$46,619	(\$620)	Underbilled

Business License Fees

The District paid CCI for business license fees on two occasions totaling \$28,221 to the Town of Irmo, the location of the CCI Office. However, CCI determined that the business license fee for pay app #25 for \$11,266.39 was for another project and should not have been included in the cost of the work for PWES.

Table F

Pay App	Business License Fees	
4	Town of Irmo	\$16,954.61
25	Town of Irmo	\$11,266.39
	Total	\$28,221.00
	Reimbursement for Pay App 25	(\$11,266.39)
	Total Net	\$16,954.61

CCI reimbursed the District \$11,926.55 via check #60099, dated 10/27/22, for the errant invoicing of the Irmo business license and included interest in its reimbursement. In doing so, the business license questioned costs decreased to \$16,954.61 as shown in Table F.

D. Internal Controls Over Contract Payments

Payments made by the District followed CCI's submission of pay apps. The SIG determined the District relied upon the certifications provided by CCI and the architect (Quackenbush) that the work was completed in accordance with the contract. The CCI certification on the pay app specifically provided that:

“The undersigned Contractor certifies that to the best of the Contractor’s knowledge, information and belief the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner, and that current payment shown herein is now due.”

The architect’s certification on the pay app specifically provided that:

“In accordance with Contract Documents, based on on-site observations and the data comprising this application, the Architect certified to the Owner that to the best of the Architect’s knowledge, information and belief the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor was entitled to payment of the AMOUNT CERTIFIED.”

The SIG determined the architect’s representative walked the site every two weeks to review progress of work performed and documented the results in a report for the District. The representative reviewed the pay apps and distributed them to the various project engineers for review to ensure accuracy and appropriateness. Furthermore, the representative merely confirmed the work was completed and that the receipts seemed reasonable, but did not verify the amounts. [SIG emphasis]

A District official stated to the SIG, *“The pay application submitted by CCI served as the invoice for the District. The District’s project manager approved each invoice and verified that the items included were complete.”* The District’s director of facilities and the construction management consultant both advised they reviewed the pay apps to ensure they were consistent with the construction progress, but did not verify the pay app amounts were supported by the appropriate documentation/invoices.

The architect’s certifications occurred in a relatively short timeframe after the CCI certifications, either the same day or the following. The current CFO found no evidence the District utilized additional scrutiny over the construction progress and payments.

The close-in-time pay app certifications are highlighted in Table G.

Table G

App #	CCI Certification Date	Architect Certification Date	Inv. Date	Voucher	Total PO 2002969 Payments
2	11/25/2019	11/25/2019	11/30/2019	1426	\$370,527.77
3	1/20/2020	1/20/2020	12/31/2019	1493	\$593,030.50
12	10/6/2020	10/7/2020	10/7/2020	1248	\$2,070,280.21
13	11/11/2020	11/11/2020	11/11/2020	1372	\$2,071,760.56
14	12/3/2020	12/3/2020	12/3/2020	1426	\$1,620,486.42
16	2/1/2021	2/2/2021	2/2/2021	1583	\$1,042,283.70
17	2/24/2021	2/25/2021	2/28/2021	1655	\$519,774.00
18	4/13/2021	4/14/2021	3/31/2021	1730	\$760,291.41
20	6/4/2021	6/4/2021	6/4/2021	1886	\$500,986.89
21	7/2/2021	7/2/2021	6/30/2021	2063	\$221,298.13
22	8/3/2021	8/4/2021	7/31/2021	1123	\$878,647.78
23	9/2/2021	9/2/2021	9/22/2021	1230	\$465,188.62
				Total	\$11,114,555.99

E. Summary Analysis of Questioned Costs

The District missed opportunities to provide effective oversight that resulted in questioned costs of \$396,700.65, which constituted 1.5% of the total amount paid for the PWES project. Subsequent investigation by the SIG identified sufficient documentation provided by CCI that reduced the final total questioned costs to \$38,362.69.

To put this in perspective, the \$38,362.69 in questioned costs amounted to 0.14% of the overall GMP of \$26,569,355.

The SIG assessed that District officials did not secure sufficient documentation that supported the pay app requests and that the District failed to provide proper contract management and oversight of the payment process. These questioned costs by themselves, however, are not indicative of fraud or illegitimate reimbursements; rather, they point to weaknesses in the District's internal controls over contract management.

F. Contingency Allowances and Change Orders

Board minutes from the 12/10/18 meeting reflected a 5-2 vote to contract with CCI for an amount "*not exceeding \$30 million dollars of general obligation bonds.*" CCI presented a [budget status report](#) at each level of the design and construction progress to the Board. CCI did not exceed the contractual GMP amount of \$26,569,355 approved by the Board.

As part of the contract, CCI established the \$26,569,355 GMP that included contingency allowance items in the SOV. Each pay app submitted by CCI identified SOV expenditures. CCI rendered contractual services within the established GMP and returned to the District \$369,467.25 in unused contingency funds. On 7/30/21, the OSF, SCDE issued a Certificate of Occupancy for the PWES project, the contracted date for final completion of the work.

As established in the CMAR contract, contingency allowances were permissible and normal among CMAR industry standards. Additionally, the CMAR contract provided for the following:

- *§ 2.2.3 A statement of the proposed Guaranteed Maximum Price, including a statement of the estimated Cost of the Work organized by trade categories or systems, allowances, contingency, and the Construction Manager's Fee.*
- *§ 2.2.4 In preparing the Construction Manager's Guaranteed Maximum Price proposals, the Construction Manager shall include its contingency for the Construction Manager's exclusive use to cover those costs considered reimbursable as the Cost of the Work but not included in a Change Order.*
- *§ 5.2.1 The Construction Manager guarantees that the Contract Sum shall not exceed the Overall Guaranteed Maximum Price, as it is amended from time to time. To the extent the Cost of the Work exceeds the Overall Guaranteed Maximum Price, the Construction Manager shall bear such costs in excess of the Overall Guaranteed Maximum Price without reimbursement or additional compensation from the Owner.*
- *§ 5.2.2 The Overall Guaranteed Maximum Price is subject to additions and deductions by Change Order as provided in the Contract Documents and the Date of Substantial Completion shall be subject to adjustment as provided in the Contract Documents.*

CCI did not use change orders to adjust the monthly SOV, but included a Contingency Accounting Activity Log along with the SOV Update and Job Cost Breakdown with the pay apps.

By contrast, the AIA in its publication [The Fundamentals of Change Orders in Construction](#) provides in part:

“The change order is fundamental to construction contracting as the primary means to modify the contract for construction.... Common reasons for construction change orders [include] unforeseen or differing site conditions...discovery of hazardous materials...delays beyond the contractor’s, architect’s or owner’s control...which may lead to reasonable delays and associated costs.... Lastly, at closeout, contract adjustments may be required to account the aforementioned items, back charges, liquidated damages or early completion bonuses, and any punch list credits due the owner for incomplete or unsatisfactory work not remedied.”³

To ensure compliance with the CMAR contract, the District contracted with Mead & Hunt for a closeout assessment of the completed project in November 2021, in accordance with a new policy the Board adopted on 10/11/21, [Policy FED: Close-Out of Construction Projects](#). The assessment included the verifications of change orders, contingency allowances, completion of deficiency items, completion of final list items (punch list), receipt of closeout documents, final payment documents, and other items as indicated in the project manual.⁴

The District did not have a change order or contingency allowance policy in effect during the PWES construction contract period. Any reference to a District change order policy that formed the basis of an opinion in an external audit or report of the District prior to 5/9/22 was based on an unapproved “draft” change order policy dated 1/19/22. [SIG emphasis]

The SIG identified the Board’s Policy Committee reviewed and proposed a change order and contingency allowance policy on 1/19/22, six months after the completion of the PWES construction project and occupancy of the school. After two revisions to the draft policy, the Board adopted [Policy FGG: Facility Construction Project Administration](#) on 5/9/22, which states in part:

“Purpose: To establish the basic structure for use of Change Orders as well as Contingency Allowances included in school construction contracts after the effective date of this Policy.”

G. Leadership in Energy and Environmental Design (LEED) Certification

Questions arose about the omission of LEED from the CMAR contract even though LEED was a component of the RFQ/RFP solicitation. Consequently, the SIG assessed whether CCI wrongfully omitted LEED certification from its construction of PWES.

The United States Environmental Protection Agency (EPA) defines [LEED certification](#) as:

“A series of rating systems aimed at increasing the environmental and health performance of buildings' sites and structures and of neighborhoods. LEED covers the design, construction, and operation of all types of buildings...EPA uses it as an umbrella term to encompass model codes, rating systems, and other publications that provide criteria for the design, construction, and maintenance of buildings.”

The CMAR RFQ/RFP identified project objectives for the construction of ES-13, which included Project Objective 1.2.1:

“Sustainability: The Owner expects to have the project designed to be certified by the Green Building Initiative (GBI) for a minimum of two (2) Globes or a project designed to achieve

³ Verrastro, Salvatore and Baum, Mark I., “The Fundamentals of Change Orders in Construction.” Retrieved from <https://learn.aiacontracts.com/articles/6378493-the-fundamentals-of-change-orders-in-construction> on 7/3/23.

⁴ [Mead & Hunt Final Report with Deficiency Corrections - Construction Closeout on Piney Woods Elementary School Dated 4/22/22](#)

LEED Silver status. Special attention is being given to energy efficiency, water conservation, photovoltaic panels, storm water quality and quantity, indoor air quality, recycling and renewable resources in addition to other sustainable practices. The requirement for the availability of Green Globes certification of this project scope will be combined with the site development package of a separate scope. Coordination with the separate site development package is required for the Green Globes certification.”

During the solicitation and RFP process, the District evaluated the contractor’s ability to deliver a product, rather than define the scope of work. With a CMAR contract, the architect (Quackenbush) is the agent for the project design, and the contractor only builds according to the architect’s design specifications.

The Quackenbush [contract](#) specified in Section 12.4, the following meeting schedule as a part of the basic services of the architect:

- Schematic Design: two meetings with the architect and District’s project team;
- Design Development: three meetings with the architect and District’s project team;
- Construction Documents: two meetings with the architect and District’s project team;
- Construction Administration: 36 site visits by the architect; and
- Twelve [meetings](#) with the District’s Board of Trustees.

In addition, during the programming and design phases to initiate the schematic design, members of the Quackenbush design team held three [programing workshops](#) to elicit input/feedback from [District representatives and the community](#). Participants (43) in the workshops included the superintendent, Board trustees (2), District office staff (14), principals and teachers (15), parents and community members (4), and consultants (7), which included the District’s construction management consultant for the PWES project.

The SIG determined the omission of the LEED requirement from the CMAR contract occurred during the negotiation phase between the District, Quackenbush, and CCI as the District sought to reduce the GMP. Both the District’s coordinator of facilities operations and the construction management consultant expressed the lack of desire to pursue the LEED certification. Regardless, the SIG determined that none of the contractor-candidate finalists was disadvantaged in the solicitation and evaluation process.

Quackenbush explained that many K-12 clients believed that LEED certification added unnecessary costs to construction projects. For example, under LEED the contractor was required to track all lift tickets and track the number of dumpsters used to haul construction debris. The LEED certification for a middle school recently designed by the same PWES architect included a sustainability fee of \$30,000 and a registration fee of approximately \$20,000. In addition, LEED practices have at times conflicted with energy efficiency, such as ventilation requirements that required more cycles. Finally, LEED scoring may include impractical items for a site like Amicks Ferry such as bike racks to encourage less reliance on automobiles.

The PWES design contract negotiated by the District specifically excluded LEED certification in order to save the costs of LEED registration, submission, implementation, and review estimated at \$150,000. The estimated savings to the District of \$150,000 permitted the acquisition of additional equipment and amenities for the school.

The SIG determined that the PWES architect’s design contract with the District, Section 1.1.6 indicated that LEED or Green Globes certifications were anticipated sustainable objectives for the project. In support of this possibility, Section 4.1 of the contract identified additional sustainable project services in Section 4.1.1.24 that contained the statement, “*Only in Design by Architect. Any actual Certification to be an Additional Service*” as illustrated in the contract excerpt [page 15] below.

Included Additional Services	Responsibility
§ 4.1.1.11 Value analysis	Architect
§ 4.1.1.12 Detailed cost estimating beyond that required in Section 6.3	Not Provided by Architect
§ 4.1.1.13 Continuous On-site project representation	Not Provided by Architect
§ 4.1.1.14 Conformed documents for construction	Architect
§ 4.1.1.15 As-designed record drawings	Architect
§ 4.1.1.16 As-constructed record drawings	Architect
§ 4.1.1.17 Post-occupancy evaluation	Not Provided by Architect
§ 4.1.1.18 Facility support services	Not Provided by Architect
§ 4.1.1.19 Tenant-related services	Not Provided by Architect
§ 4.1.1.20 Architect's coordination of the Owner's consultants	Architect
§ 4.1.1.21 Telecommunications/data design	Architect, but compensation outlined in Attachment B
§ 4.1.1.22 Security evaluation and planning	Not Provided by Architect
§ 4.1.1.23 Commissioning	Not Provided by Architect
§ 4.1.1.24 Sustainable Project Services pursuant to Section 4.1.3	Only in Design by Architect. Any actual Certification to be an Additional Service
§ 4.1.1.25 Fast-track design services	Not Provided by Architect
§ 4.1.1.26 Multiple bid packages	Not Provided by Architect
§ 4.1.1.27 Historic preservation	Not Provided by Architect
§ 4.1.1.28 Furniture, furnishings, and equipment design	Architect, but compensation outlined in Attachment B
§ 4.1.1.29 Other services provided by specialty Consultants	Not Provided by Architect
§ 4.1.1.30 Other Supplemental Services	Not Provided by Architect

Section 4.1.3 of the contract reflected, “[*intentionally omitted*].”

The SIG determined the PWES architect’s design incorporated sustainability and energy conservation principles, including materials, energy-efficient mechanical systems, proper shading and glazing to avoid glare and heat retention, and sustainable practices on site. In consultation with the Office of the State Engineer the SIG determined that while state law has given agencies the option to pursue LEED/Green Globe, it is not a requirement for school districts.

II. Piney Woods Elementary School Selection Committee

The District established a selection committee for the purpose of evaluating and selecting qualified contractors for the design, engineering and construction of PWES. Specifically, the selection committee was tasked with evaluating responses for the following solicitations:

- Design and Engineering Services Solicitation #2018-044, and
- CMAR Services for a “New Elementary School” Solicitation #2019-007.

A. Selection Committee Composition

The South Carolina Consolidated Procurement Code established the procedures and qualifications for members of a procurement selection committee. Specifically, South Carolina Code of Laws, §11-35-3220 (*Qualifications based selection procedures*) states,

“Agency Selection Committee. A governmental body shall establish its own architect-engineer, construction management, and land surveying services selection committee, referred to as the agency selection committee, which must be composed of those individuals the agency head determines to be qualified [emphasis added] to make an informed decision as to the most competent and qualified firm for the proposed project. The head of the governmental body or his qualified responsible designee shall sit as a permanent member of the agency selection committee for the purpose of coordinating and accounting for the committee's work. To assist an agency selection committee in the selection of firms to be employed for significant or highly technical projects and to facilitate prompt selections, the agency selection committee may invite the State Engineer or his designee to sit as a nonvoting member of the committee.”

The [District's procurement code](#) (3220.1 District Selection Committee) in effect at the time of the PWES procurement, stated in part:

“The District shall establish its own architect-engineer, construction management, and land surveying services selection committee, referred to as the "District Selection Committee", that must be composed of those individuals whom the Board of Trustees or its designee determines to be qualified to make an informed decision as to the most competent and qualified firm for the proposed project. The Superintendent or his qualified responsible designee shall sit as a permanent member of the District Selection Committee for the purpose of coordinating and accounting for the committee's work. Final selection and award of contracts for architect/engineer and surveying services must be approved by the Board of Trustees.”⁵

The composition of the selection committee, which included the Board chair, is set forth in Table H.

Table H

6/21/18 Meeting	7/10/18 Meeting	9/18/18 Meeting	10/25/18 Meeting	District relationship as a Selection Committee member
Scott Carlin	Scott Carlin	Scott Carlin	Scott Carlin	District Coordinator of Facilities
Anna Miller	Anna Miller	Anna Miller	Anna Miller	District Director of Academic Affairs
Bruce Shealy	Bruce Shealy	Bruce Shealy	Bruce Shealy	District Director of Finance
	Robert Gantt	Robert Gantt	Robert Gantt	District Board Chair
Larry Haltiwanger	Larry Haltiwanger		Larry Haltiwanger	District Board Trustee
The following ad hoc members were in attendance: [non-voting]				
A. Len Richardson	A. Len Richardson	A. Len Richardson	A. Len Richardson	District CFO, Committee Chair
Lynda Robinson		Lynda Robinson	Lynda Robinson	District Procurement Officer
Dan Neal	Dan Neal	Dan Neal	Dan Neal	District Consultant
		P. Douglas Quackenbush	P. Douglas Quackenbush	Design Architect & Principal Quackenbush Architects
		Barbara Haller	Barbara Haller	Principal Quackenbush Architects

⁵The South Carolina Division of Procurement Services (DPS) approved the District's procurement code by [letter dated 6/4/08](#).

B. Internal Controls Over the Selection Committee

The internal controls over the selection committee included the appointment of the qualified members, certification of no actual or apparent conflict of interest, the recording of minutes of the committee proceedings, the use and retention of work papers related to the evaluation of contractor-candidates, and approval by the District's Board. On 9/11/18, each member of the selection committee executed an acknowledgement and certification document titled, "[Confidentiality and Conflict of Interest Policy](#)."

The SIG determined the District did not maintain documentation to support the appointment of qualified committee members. Specifically, the District was unable to provide the identity of the appointing official, documentation regarding the appointments, the timing of the appointments, or the criteria used for determining qualified committee members.

1. Selection Committee Evaluations and Board Approvals

Selection committee actions were recorded in the approved minutes and posted on the District's website. The minutes for the 10/25/18 meeting were marked "DRAFT" as no additional meeting was held to approve the minutes. Committee members received minutes of the final meeting by email to review for accuracy with a request to respond with any changes. The committee's work papers were retained and each evaluator certified the use of the RFP's evaluation criteria along with a narrative explanation of the evaluator's scoring.

The selection committee presented the results to the Board in executive session on 12/10/18, which the Board subsequently approved in a 5-2 vote during the public session to approve the architect contract, the CMAR agreement, and the issuance of general obligation bonds not to exceed \$30 million. A detailed timeline of the committee's actions and Board approvals is set forth in [Appendix B](#).

C. Conflict of Interest Disclosures by Selection Committee Members

In May 2018, subsequent to the appointment to the selection committee, one member provided a written disclosure of a potential conflict of interest for consideration by the chair of the selection committee prior to conducting any evaluation of potential respondents to the procurement solicitations. The SIG determined that the District's counsel and Board chair reviewed the matter and deemed the committee member qualified to serve on the selection committee. The member made a similar disclosure in 2016 on an unrelated procurement matter and was deemed qualified to serve on that selection committee.

Subsequent to the PWES committee's review of respondent submissions to the CMAR solicitation a 2016 letter of reference, included in the CCI submission was identified as having been authored by another committee member. The letter of reference was general in nature and not specific to the 2018 CMAR solicitation. The SIG determined the Board chair and another Board member, as representatives on the selection committee, reviewed the matter and determined that no conflict of interest existed and the committee member was deemed qualified to serve on the selection committee.

Further analysis of the committee's evaluations of CMAR submissions determined that CCI remained the highest-rated contractor-candidate even with the exclusion of both committee members' scoring from the aggregate scores.

Notwithstanding the determinations made by the Board chair and the District's counsel at that time, a minority number of Board members continued to question the composition of the PWES selection committee even after the Board approved the contract award for the PWES construction to CCI in December 2018.

Throughout 2020 and into 2021, the same minority number of Board members continued to question the composition of the selection committee. Between August 2021 and October 2021, a separate District counsel conducted an investigation of the same selection committee member for the same potential conflict of interest previously disclosed and evaluated. The District counsel briefed the Board in executive session in October 2021 and opined that no conflict of interest existed for the committee member.

Contemporaneous to the second investigation the District retained a third attorney in August 2021 to conduct an independent review of the same matter. On 11/15/21, the independent, third attorney briefed the superintendent and concluded the investigation did not support a finding of conflict of interest by the committee member. Furthermore, no documentation was provided to the SIG by the District that sought an official or unofficial opinion from the State Ethics Commission on this matter.

D. SIG Summary Analysis

The SC Code of Laws, §8-13-700 (B) (1) requires that, *inter alia*, public employees shall:

“...prepare a written statement describing the matter requiring action or decisions and the nature of his potential conflict of interest with respect to the action or decision...”

The statute further provides that “...a public employee...shall furnish a copy of the statement to his superior, if any, who shall assign the matter to another employee who does not have a potential conflict of interest.”

The SIG determined the committee member prepared written statements as required by South Carolina Code of Laws, §8-13-700 (B) that provided written notice to the selection committee of a potential conflict of interest, and the agency head was apprised of the potential conflict who deemed the committee member was qualified to serve on the committee.

In support of this determination, between May 2018 and November 2021, the District and the Board received three separate legal reviews from District attorneys each of whom opined that no conflict of interest existed with respect to the selection committee member.

The SIG assessed that the Board’s disregard of three legal reviews, including two investigations constituted a waste of District resources and Board interference in violation of Board Policy BBA, “[Board Powers and Duties](#).”

E. Change in Board Policy FEC: Selection of Professionals in Facilities Construction

On [5/9/22](#), the Board adopted a change to [Policy FEC: Selection of Professionals in Facilities Construction](#) for establishing “...the basic structure for the selection of professionals by the district.” The revised policy further provided that:

- *Members of the Board of Trustees be [sic] barred from voting or ad Hoc [sic] membership on professional selection committees;*
- *Candidates for voting or ad hoc membership of the selection committee be [sic] vetted to determine apparent or actual conflicts of interest and [sic] conflicts of interest are determined, that candidates must withdraw their name from consideration;*
- *Voting or ad hoc members of selection committees be required to sign and adhere to the Districts’ [sic] Confidentiality and Conflict of Interest Policy.*

III. District Procurement Code Compliance

The District's procurement code in effect during the PWES project received approval from the Division of Procurement Services (DPS), State Fiscal Accountability Authority by letter dated 6/4/08. On 2/7/22, the District amended its procurement code, which also received approval from DPS on 4/5/22.

A. Unapproved Brokerage Service Agreement

On 9/23/15, the District's chief financial officer, on behalf of the District, executed a Buyer Agency Agreement with The Educational Group, Inc. (TEG) to act as a buyer's exclusive agent to locate real property for purchase as a suitable site for an elementary school. The District's procurement code and [list of exemptions](#) provided that brokerage services were subject to Board approval.⁶

On 7/17/17, the Board approved, by a vote of 6-1, the District's purchase of real estate, previously optioned, near the intersection of Amicks Ferry Road and Lake Tide Drive for \$932,950. However, the Board did not vote on the brokerage services agreement as required by the District's procurement code.

The SIG determined that while the Board approved the District's purchase of the Amicks Ferry Road on 7/17/17 the District failed to comply with its procurement code when it executed a brokerage services agreement with TEG without Board approval in 2015.

B. Procurement Audit Services Solicitation #2022-011

The District issued an RFP ([Solicitation #2022-011](#)) on 10/6/21, for procurement audit services for fiscal years (FY) 2018-19, 2019-20, 2020-21, with optional years of 2016-17 and 2017-18. The District selected the Jaramillo Accounting Group (JAG), LLC, of Albuquerque, New Mexico to perform the audit.

By letter dated [12/16/21](#), the Division of Procurement Services approved JAG to perform an Agreed Upon Procedures (AUPs) audit for the District "*contingent upon the firm following our School District AUPs as revised on May 24, 2021.*" Specifically, the approval of JAG to perform an AUP procurement audit was solely for FY 2020-21.

Amendments to the solicitation could occur at any time prior to opening the bids. By doing so, all bidders that requested a bid package would receive copies of all amendments. This in turn allowed bidders to modify their response to the solicitation prior to the opening of the bids. The SIG verified the District did not amend the scope and intent of the solicitation, which sought to acquire a certified public accounting firm to provide "independent procurement audit services" for the District.

By letter dated [1/15/22](#), the Board, District and JAG entered into an agreement that diverged from the RFP's original scope and intent of "procurement audit [emphasis added] services" to "procurement consulting services" for FYs 2017-2020. The agreement acknowledged the RFP required that the procurement audit "*...must be performed in accordance with...the audit procedures issued by the South Carolina State Fiscal Accountability Authority, Division of Procurement Services,*" among others. Moreover, the agreement recognized the District received procurement audits for FYs 2017-2020, but added:

"...Eliminating this requirement [SFAA, DPS audit procedures] is necessary since the procurement audits have already been performed (except for fiscal year 2021, which has a separate attestation examination engagement letter). The scope is hereby changed to consulting services, for fiscal years 2017-20 and includes providing recommendations for

⁶ School District Five of Lexington & Richland Counties [Procurement Code](#), §710 (effective 6/4/08).

improvement over various risk areas reported to JAG during our planning and testing samples of risk areas.”

Over the course of the engagement, the District paid a total of \$105,650 on the consulting services contract. As of 6/30/23, invoices totaling \$50,582.81 remained unpaid for lack of sufficient detail, including time, dates, and description of work performed by JAG.

In response to the auditor findings [conditions], the District published a [corrective action plan](#) to address the issues and promote financial accountability and transparency.

C. Annual Financial and Procurement Audit Solicitation #2022-035

On 2/16/22, the District issued an RFP ([Solicitation #2022-035](#)) for financial and procurement audit services for FY 2021-22 with renewal options for FYs 2022-23 and 2023-24. On [3/28/22](#), the Board voted unanimously to authorize a contract with JAG for financial and procurement audit services for FYs 2021-2022, 2022-2023, and 2023-2024.

On 11/29/22, JAG issued the District’s FY 2021-22 Annual Comprehensive Financial Report.⁷ The auditor issued a single finding of material non-compliance and material weakness.⁸

In response to the finding, the District published a [corrective action plan](#) that included a plan to change organizational culture, starting with tone at the top, including training, employee evaluations, consequences for violations, rewards for ethical behavior, posting a fraud hotline in the District, implementing an audit committee, hiring an internal auditor, and carefully choosing procurement committee members.

D. SIG Summary Analysis

Consulting service vendors listed on the statewide contract are available for use by state agencies, public school districts, and other governmental entities. Inasmuch as the scope of the JAG engagement letter with the District diverged from the RFP’s solicitation for procurement audit services, the SIG determined this solicitation for procurement audit services was an unnecessary expenditure of District resources.

The District only needed the most recent fiscal year (2020-21) audited, not the prior five fiscal years. While JAG’s winning bid of \$46,000 included procurement audits for five fiscal years (2017 – 2021) the SIG noted the District only needed to spend \$9,500 quoted by JAG for the FY 2020-21 procurement audit. As a result, the change in scope from the original RFP to a consulting services engagement resulted in Board-approved increases totaling \$105,650.

The SIG determined that the change in scope from a procurement audit to a consulting services contract constituted:

- A substantial departure from the RFP scope and the approval granted by DPS;
- The standard audit reporting procedure required by DPS did not contain provisions for examination of campaign contributions, ethics issues, and legal conclusions;
- The RFP solicited procurement audit services for four prior fiscal years that previously received procurement audits consistent with the audit procedures required by the DPS; and
- The consulting services agreement constituted waste amounting to \$105,650.

⁷ Per South Carolina Code of Laws §59-17-100, school districts must submit their annual single audit report to the South Carolina Department of Education by December 1st of each year.

⁸ [Schedule of Findings and Questioned Costs](#), pp. 138-140

IV. Way Forward

This review identified procurement and contract management issues over an eight-year span of the PWES construction project. The District's students have utilized the new PWES and its amenities for the past two school years. Without question, the District is moving forward through the proactive strategies, policies, and efforts implemented by the District's Board, superintendent, and CFO to be ahead of a problem as opposed to reacting to one.

Over the past two years, the following policy changes related to this review enhanced the District's internal controls and Board oversight:

- On 10/11/21, the Board adopted [Policy FED: Close-Out of Construction Projects](#) to ensure that district construction projects are completed in compliance with the specifications of the project.
- On 1/24/22, the Board adopted a revised [Policy FEE: Site Acquisition](#) to establish the basic structure for the acquisition of sites for school construction.
- On 5/9/22, the Board adopted [Policy FGG: Facility Construction Project Administration](#) to establish the basic structure for use of change orders as well as contingency allowances.
- On 5/9/22, the Board adopted a revised [Policy FEC: Selection of Professionals in Facilities Construction](#) to establish basic structure for the selection of professionals by the district.
- On 1/23/23, the Board adopted a revised [Policy AR DI/DIE-R: Fiscal Accounting/Audits - External Auditor Selection](#).
- On 2/13/23, the Board adopted a revised [Policy DI/DIE: Fiscal Accounting/Audits](#) to establish the basic structure for accounting and reporting of the district's financial resources, enhanced internal controls, external audits, and the role of an internal auditor.

In addition, on [2/7/22](#) the Board adopted a revised District Procurement Code that was submitted to DPS for approval. The new [District Five Procurement Code](#) received approval from DPS on 4/5/22, which is substantially similar to the provisions of the South Carolina Procurement Code and Regulations.

The District initiated other process improvements as advised by the District's CFO, in response to identified weaknesses in internal controls to include:

- In July 2023, the finance office completed two training classes with bookkeepers and secretaries who performed finance/procurement functions in preparation for the new school year;
- The District developed a mechanism to consolidate and track procurement violations by employees to assess and prevent repeated occurrences;
- The District is developing a new financial services procedures manual and a revised procurement manual that is expected to be completed in the fall of 2023 and shared on the District's website; and
- The District is in the process of hiring an internal auditor.

During this review, the SIG conducted extensive interviews and studied large volumes of documents. The SIG did not identify where the District, its personnel, and its Board had anything but the best intentions for the success of the procurement process for the construction of the PWES. However, as a public body tasked as a steward of state and federal monies, the District could have done better.

The SIG identified several areas of concern as detailed in the Findings and Recommendations section of this report, for which most have been addressed through the initiation of new policies or the implementation of policy changes that enhanced the District's internal controls and processes through the District's efforts.

The SIG extends its appreciation to the District's current and former leadership, Board members, employees, representatives, project managers, and contractors for the PWES project. In addition, the SIG is appreciative of the collaboration with the state's Division of Procurement Services, the Office of State Engineer, the South Carolina Department of Education, the Office of the State Auditor, the State Ethics Commission, the District's external auditors, and other persons associated with the PWES project for their assistance and cooperation provided during this review.

V. Findings and Recommendations

Finding #1: The SIG determined the District's accounts payable officials and project managers did not ensure sufficient documentation was provided by CCI to support the amount requested for payment in the pay apps and that the District failed to provide proper contract management and oversight of the payment process. This resulted in missed opportunities to ensure stewardship of taxpayer funds and questioned costs of \$396,700.65 for the PWES project. Subsequent investigation by the SIG identified sufficient documentation that reduced the final total of questioned disbursements to only \$38,362.69.

Recommendation #1: The SIG recommends that the District ensure sufficient supporting invoices or other documentation are provided by the contractor to support the amount requested for payment, provide proper contract management and oversight of the contract payment process, and remediate and strengthen internal controls. Based on policy changes, internal controls, and training initiated by the District's Board, superintendent, and CFO over the past two years this matter has been addressed. **No further action is required.**

Finding #2a: The SIG determined that a selection committee member prepared written statements as required by the South Carolina Code of Laws §8-13-700 (B)(3) that provided notice to the selection committee of his/her potential conflict of interest, and the agency head was apprised of the member's potential conflict and deemed him/her qualified.

Finding #2b: The SIG determined District officials and selection committee members were unable to provide the identity of the appointing official, documentation regarding the appointments, the timing of the appointments, or the criteria used for determining qualified committee members.

Recommendation #2: The SIG recommends that the agency head ensure any delegation of authority, the appointment of selection committee members, and the criteria used for selection be documented and retained in the procurement file. Based on policy changes, and internal controls implemented by the District's Board, superintendent, and CFO over the past two years this matter has been addressed. **No further action is required.**

Finding #3: The SIG determined that the Board's disregard of at least three legal reviews, including two investigations, in order to pursue ethics actions against a selection committee member constituted waste of District resources, amounting to at least \$12,605 and Board interference in violation of Board policy BBA.

Recommendation #3: The SIG recommends that the Board should adhere to all Board policies.

Finding #4a: The SIG determined that the District's execution of a Buyer Agency Agreement with The Education Group, Inc. without Board approval was a violation of the District's procurement code.

Finding #4b: The SIG determined that the District issued an RFP (Solicitation #2022-011) seeking a certified public accounting firm to provide procurement audit services for FYs 2019 - 2021, with the option to also audit FYs 2017 and 2018. As specified in the Scope of Work of the RFP, the procurement audit was required to be performed in accordance with the agreed upon audit procedures issued by the DPS. However, the audit agreement was changed by Board and District representatives from a procurement audit to a procurement consulting services contract, which was a substantial departure from the RFP requirements that resulted in the waste of \$105,650 in District resources.

Recommendation #4: The SIG recommends that the Board and District leadership receive training regarding the District's procurement code and the role and authority of the procurement officer in awarding contracts.

School District Five Board of Trustees Retreat - September 15, 2023
Saluda Shoals Park - River Center
DRAFT Timeline

8:15 a.m.		Arrive at Saluda Shoals Park/River Center
8:30 a.m.	10:00 a.m.	<p><i>Team Building Activity:</i> Kayaking and guided tour down the Saluda River. Everyone will take a shuttle from the River Center to the Saluda River to board their kayak.</p> <ul style="list-style-type: none"> You will be fitted with life jackets and given instructions about the kayak and river. Please wear clothes that are comfortable and can get wet. <p><i>THE RIVER MOVES IN ONE DIRECTION. WORKING TOGETHER, WE CAN ALL REACH A COMMON GOAL!</i></p>
10:05 a.m.	10:15 a.m.	Shuttled Back to the River Center
10:15 a.m.	10:30 a.m.	<i>Opportunity to change clothes before calling the retreat to order</i>
10:30 a.m.	10:35 a.m.	Board Chair (Call Retreat to Order & Approve the Agenda)
10:35 a.m.	1:00 p.m.	<p><i>Roles & Relationships:</i> Establishing the Board's Commitment to School District Goals and Working Together to Accomplish Those Goals</p> <p>Review Board Policy AE "Accountability/Commitment to Accomplishment"</p>
1:00 p.m.	1:55 p.m.	<i>Lunch</i>
2:00 p.m.	3:30 p.m.	<i>Discussion of Adopting Updated Policies</i>
3:30 p.m.	4:00 p.m.	<i>Closing Comments/Priorities</i>
	4:00 p.m.	<i>Adjourn</i>

Policy AE Accountability/Commitment to Accomplishment

Issued 1/06

Purpose: To establish the board's vision for school district goals and objectives and the basic structure for developing a district performance-based accountability system and comprehensive plans.

Mission statement

The mission of School District Five of Lexington and Richland Counties, an educational community unified by an uncompromising commitment to excellence and strengthened in diversity, is to ensure that each student fulfills his or her potential and excels in a changing world by instilling integrity and virtue, stimulating critical and creative thinking, developing effective communicators and problem solvers, and fostering superior achievement and life long learning.

The district will implement this vision by providing life-long learning opportunities that will develop the potential of all individuals and thereby improve the quality of life for all citizens of the district.

Goals and objectives

Board of Trustees Goals (2005-2006)

<u>Goal I</u>	To serve as an advocate for the children of District Five and to ensure that every student has a fair, equitable and appropriate opportunity to participate in quality educational experiences while being prepared for a successful life after completion of their K-12 experience.
<u>Goal II</u>	To vigorously support the mission of the school district, the strategies and action plans of the district and individual school strategic plans, the goals and strategies of the superintendent and district administration, and the board standards as established by the South Carolina School Boards Association.
<u>Goal III</u>	To promote effective communication with employees, students, parents/legal guardians and members of the community in order to develop positive relationships and active stakeholder support of the programs and activities of the school district.
<u>Goal IV</u>	To participate in programs designed to provide proactive support for continuous improvement in public education both locally and at the state and national levels.
<u>Goal V</u>	To provide for the development and implementation of both short- and long-range building plans and programs that will address both present and future needs of the district.
<u>Goal VI</u>	To maintain and ensure compliance with policies which define the organization, governance, management and operations of the school district.
<u>Goal VII</u>	To provide appropriate resources that maintain the tradition of quality in educational opportunities for students served in the school district.

2005-2006 District Administrative Goals

<u>Goal I</u>	To manage the operations and functions of the school district in an orderly, effective and efficient manner.
<u>Goal II</u>	To oversee the activities of the district to ensure compliance with the district's mission and beliefs as well as all school board policies.

<u>Goal III</u>	To supervise the implementation of the action plans included in the district strategic plan.
<u>Goal IV</u>	To maintain continuous communication with all stakeholders in the district in order to promote ownership and positive relations.
<u>Goal V</u>	To develop plans designed to address both short- and long-range facilities needs in the district.
<u>Goal VI</u>	To serve as facilitator and conduit for the goals adopted by the board of trustees.
<u>Goal VII</u>	To provide for the safety, welfare and success of students and staff in the school district.
<u>Goal VIII</u>	To continue to monitor curricular and instructional programs and issues for the purpose of continuous improvement.

Accountability system

As required by the Education Accountability Act of 1998, the board will ensure the establishment of a district system of performance-based accountability and incorporate it into the district's strategic plan. Each school will indicate the accountability components in its improvement or renewal plan.

The board must review and revise the accountability system annually.

The district must involve parents, teachers and principals in the development, annual review and revision of the district accountability system.

Comprehensive plan

The district will develop and implement five-year comprehensive plans by schools and by the district to meet the requirements of The Early Childhood Development and Academic Assistance Act of 1993 ([Act 135](#)), Section 2 and Section 11.

District and school plans will be derived from strategies found to be effective in educational research. The plans must contain performance goals, interim performance goals and timelines for progress. Further, the district will develop methods of assessing the effectiveness of strategies to indicate whether strategies should be continued, modified or terminated.

The district will submit copies of its five-year comprehensive plan and its district performance-based accountability system to the State Department of Education for review in accordance with the law.

Adopted 1/9/06

Legal references:

South Carolina Code of Laws, 1976 as amended:

[Section 59-20-60](#) - Improvement councils.

[Section 59-18-1300](#) - District accountability system, development and review.

[Section 59-18-1310](#) - Reports consolidated; submission dates.

[Section 59-18-1500](#) - ...Review and revision of improvement plan.

School District Five of Lexington and Richland Counties



MEMORANDUM

To: Members of the Board of Trustees

From: Maddison Paul,
Chief Financial Officer

Date: August 17, 2023

Re: August 21, 2023 Board Meeting
Information Only
FY2022-2023 Report of Minority Business Expenditures

Item: FY2022-2023 Report of Minority Business Expenditures

Background: Pursuant to Section 5240.1 of the Procurement Code of School District Five of Lexington and Richland Counties, the FY2022-2023 Report of Minority Business Expenditures is attached for your information.

Attachments



Small and Minority Business Contracting and Certification MBE Semi-Annual Progress Report

Six-Month Report Period: 07/2022 **Through:** 12/2022

School District: School District Five of Lexington & Richland Counties **Telephone Number:** (803) 476-8000

Prepared By: Lynda Robinson **Title:** Purchasing Coordinator

I. Funds Expended *(Report only those funds within your controllable dollars as defined in the District's MBE Utilization Plan for this fiscal year.)*

- a. Total dollar value of funds expended during reporting period: \$4,054,258.90
- b. Total dollar value of funds expended with certified minorities during reporting period: \$131,671.59

II. Additional Information

- a. Number of solicitations* made to certified minorities: 16
- b. Number of responses received from certified minorities: 4

*Solicitations include the receipt of quotes as well as formal solicitations.



Small and Minority Business Contracting and Certification MBE Semi-Annual Progress Report

Six-Month Report Period: 01/2023 **Through:** 06/2023

School District: School District Five of Lexington & Richland Counties **Telephone Number:** (803) 476-8000

Prepared By: Lynda Robinson **Title:** Purchasing Coordinator

I. Funds Expended *(Report only those funds within your controllable dollars as defined in the District's MBE Utilization Plan for this fiscal year.)*

a. Total dollar value of funds expended during reporting period:	\$4,228,317.76
b. Total dollar value of funds expended with certified minorities during reporting period:	\$76,379.82
c. Total dollar value of funds expended for FY23:	\$8,282,576.66
d. FY23 total dollar value of funds expended with certified minorities:	\$208,051.41
e. FY23 minority utilization rate:	2.51%

II. Additional Information

a. Number of solicitations* sent to certified minorities during reporting period:	27
b. Number of responses received from certified minorities during reporting period:	7
c. FY 23 total solicitations* sent to certified minorities:	43
d. FY 23 total number of responses received from certified minorities:	11

*Solicitations include the receipt of quotes as well as formal solicitations.

2022-2023 through 2026-2027 District Strategic Plan Update

April 24, 2023

Agenda

- ▶ Review of Strategic Plan Requirements
- ▶ Needs Assessment and Goals
- ▶ Strategies
- ▶ Action Steps and Implementation
- ▶ Annual Revision

Strategic Planning Requirements

- ▶ District Strategic Plans and School Renewal Plans are to be developed every five years and updated annually as required by the Early Childhood Development and Academic Assistance Act of 1993 (S.C. Code Ann §59-139-05 et seq.), the Education Accountability Act of 1998 (S.C. Code Ann §59-18-1300, 1310, and 1510) and the State Board of Education Regulation 43-261.
- ▶ District Strategic Plans and School Renewal Plans, as well as Annual Updates, are due April 30th of each year and the plans become effective July 1.

Source: <https://ed.sc.gov/districts-schools/state-accountability/district-strategic-and-school-renewal-plans/>

Strategic Planning Requirements

- ▶ Strategic plans are required to address the following areas (SCDE Regulation No. 43-261):
 - ▶ School Climate
 - ▶ Student Achievement
 - ▶ Teacher/Administrator Quality
- ▶ Districts are also required to have a plan for Gifted and Talented programs (SCDE Regulation No. 43-220), and this has been tied to the strategic plan process since 2018.

Strategic Planning Requirements

- ▶ The strategic planning process requires that districts undertake a **comprehensive needs assessment**.
- ▶ Our needs assessment occurred in 2021 as we closed out the 2015-16 to 2020-21 strategic plans and launched our 2022-23 to 2026-27 plans.
- ▶ Needs assessments are usually aligned to **reaccreditation cycles**, but our reaccreditation process will not occur until the 2023-24 school year due to changes to our accrediting organization and updates to their standards.



Needs Assessment

- ▶ What steps were followed during the Needs Assessment?
 - ▶ The district assembled a team of sixty-nine parents, staff members, teachers, administrators, and community members to review data.
 - ▶ Committees then:
 - ▶ Identified strengths and opportunities for improvement
 - ▶ Drafted goals
 - ▶ The goals were approved by the board on June 14, 2021. Potential strategies were also outlined.

School Climate – Goals

- ▶ We will maintain a safe and secure environment focused on the social and emotional growth and development of all students as measured by:
 - ▶ the **percentage of parents, students, and teachers satisfied with the social and physical environment** on the annual State Department of Education Report Card Opinion Survey increasing from 88.78% to 89% (parents), 84.03% to 84.6% (students), and 92.35% to 94.1% (teachers) by 2027.

Student Achievement – Goals

- ▶ We will provide challenging curricula focused on the academic development and college and career readiness of all students as measured by:
 - ▶ students in grades 2-8 will have a **Median Student Growth Percentile** of 55 or above on MAP Growth Math and 56 or above on MAP Growth Reading by 2027
 - ▶ the **graduation rate** will increase from 90.06% to 91.16% by 2027
 - ▶ the percentage of students who are **college or career ready** will meet or exceed 78% through 2027

Teacher/Admin Quality – Goals

- ▶ We will recruit, retain, and develop a highly effective, diverse staff as measured by:
 - ▶ the annual **teacher retention rate** increasing from 90.24% to 91.3%
 - ▶ the percentage of teachers who are **satisfied with current working conditions** increasing from 90.95% to 92% on the annual State Department of Education Survey
 - ▶ the percentage of teachers who agree that there **are relevant professional development opportunities** offered at their school increasing from 92.23% to 93% on the annual State Department of Education Survey

Gifted and Talented – Goals

- ▶ We will provide challenging curricula focused on the academic development of students in gifted programs and provide equitable opportunities for participation in gifted programs as measured by:
 - ▶ students in grades 2-8 in the Initial Achievement Band of 90th percentile or above will have a **Median Student Growth Percentile** of 58 or above on MAP Growth Math and 55 or above on MAP Growth Reading by 2027
 - ▶ the **Advanced Placement passage rate** will meet or exceed 68% through 2027
 - ▶ the **proportion of students who are coded as Black or African American, Hispanic or Latino, or Two or More Races** who participate in AGP, Honors, AP, IB, and Dual Enrollment courses will increase from 17.1% to 27.1% (grades 3-5), 35.7% to 45.7% (grades 6-8), and 49.1% to 59.1% (grades 9-12) by 2027

Goals

- ▶ Each school developed goals aligned with the district's goals.
- ▶ The school-level goals were set based on the individual school's baseline data.

Strategies

- ▶ What steps were followed during the strategy development phase?
 - ▶ The district assembled a team of thirty-six parents, students, staff members, teachers, administrators, and community members to identify strategies that would orient the district's work towards the goals.
 - ▶ Committees then:
 - ▶ examined the goals
 - ▶ discussed the needs of our students, teachers, schools, and district
 - ▶ created needs-informed strategies to help the district achieve its goals
 - ▶ The strategies were approved by the board on December 13, 2021.

School Climate – Strategies

- ▶ We will maintain a safe and secure environment focused on the social and emotional growth and development of all students.
 - ▶ We will **partner and engage with families** in order to better understand and address the safety, social, and emotional needs of our students.
 - ▶ We will implement research-based practices to ensure the **social and emotional development** of our students.
 - ▶ We will promote a safe and secure environment through the establishment, teaching, and reinforcement of **school-wide expectations**.
 - ▶ We will promote a safe and secure environment through our **bullying prevention and intervention** programs and practices.
 - ▶ We will provide a safe and secure environment for students through the development and implementation of **school safety** procedures.
 - ▶ We will provide a safe, secure, and equitable **physical environment** for all students by monitoring, maintaining, and improving district-owned **facilities**.

Student Achievement – Strategies

- ▶ We will provide challenging curricula focused on the academic development and college and career readiness of all students.
 - ▶ We will provide challenging curricula and implement researched-based instructional practices to ensure the academic development and college or career readiness of **all students**.
 - ▶ We will provide challenging curricula and implement researched-based instructional practices to ensure the academic development and college or career readiness of **multi-language learners**.
 - ▶ We will provide challenging curricula and implement researched-based instructional practices to ensure the academic development and college or career readiness of **students with disabilities**.
 - ▶ We will provide challenging **Career and Technical Education** curricula and opportunities to ensure graduates are **career ready**.
 - ▶ We will provide meaningful opportunities for **adult learners** to become college or career ready.
 - ▶ We will offer and support differentiated opportunities for challenging curricula through **magnet and choice** programs.

Teacher/Admin Quality – Strategies

- ▶ We will recruit, retain, and develop a highly effective, diverse staff.
 - ▶ We will provide an equitable learning environment which ensures the development of all students by **retaining a highly effective faculty and staff.**
 - ▶ We will improve our ability to offer diverse and equitable learning environments by **retaining and sustaining faculty, staff, and administrators who come from populations that are traditionally underrepresented in our classrooms and schools.**
 - ▶ We will provide an equitable learning environment which ensures the development of all students by **recruiting a highly effective faculty and staff.**
 - ▶ We will improve our ability to offer diverse and equitable learning environments by **recruiting faculty, staff, and administrators who are representative of the students and communities we serve.**
 - ▶ We will improve our ability to offer a learning environment which ensures the development of all students by **providing ongoing support to teacher candidates entering the profession through alternative certification programs.**
 - ▶ We will provide an equitable learning environment which ensures the development of all students by **continuing and expanding our professional development programs** with an emphasis on **choice** offerings for faculty and staff.

Gifted and Talented – Strategies

- ▶ We will provide **challenging curricula focused on the academic development of students in gifted programs** and provide equitable opportunities for participation in gifted programs.
 - ▶ We will **provide a challenging and accelerated curriculum** to gifted and talented students in order to ensure their academic development.
 - ▶ We will ensure an equitable learning environment and the academic development of all students by **improving support to students who are taking AGP, Honors, AP, IB, or Dual Enrollment courses for the first time.**
 - ▶ We will improve our ability to provide a learning environment which ensures the development of all students by **providing professional development opportunities on the needs of gifted learners to all teachers.**
 - ▶ We will improve our ability to provide a learning environment which ensures the development of all students by **providing opportunities for collaboration between teachers at different schools.**

Gifted and Talented – Strategies

- ▶ We will provide challenging curricula focused on the academic development of students in gifted programs and **provide equitable opportunities for participation in gifted programs.**
 - ▶ We will improve our ability to provide an equitable learning environment which ensures the development of all students **by using district criteria for local identification to place academically talented students in AGP courses.**
 - ▶ We will improve our ability to provide an equitable learning environment which ensures the development of all students by **providing parent education about academic opportunities and supports** needed for high achieving students.
 - ▶ We will improve our ability to provide an equitable learning environment which ensures the development of all students by **increasing communication regarding opportunities for students and the importance of taking AGP, Honors, AP, IB, and Dual Enrollment courses.**
 - ▶ We will improve our ability to provide an equitable learning environment which ensures the development of all students by **providing access to experiential learning opportunities for all students** in order to improve student engagement.

Strategies

- ▶ The strategies at each school are aligned to the district's strategies.



Action Steps and Implementation

- ▶ Each district-level strategy is led by one or two members of the district administration.
- ▶ The district administrators are responsible for implementation of the action steps during the year.

Domain	Strategy	Leader(s)
School Climate	Partner and Engage with Families	David Price & Jennifer Felkel
	Social and Emotional Development	Jennifer Felkel & Michael Guliano
	School-wide Expectations	Michael Guliano & Kelly Brown
	Bullying	Kelly Brown
	Facilities	Allen Knotts
	Safety	Dana Catoe & Ross Wise
Student Achievement	Overall	Tina McCaskill & Neshunda Walters
	Multilingual Learners	Julie Schelble
	Students with Disabilities	Dr. Angie Slatton
	Career and Technical Education	David Prigge
	Adult Learners	Paula Wright
	Magnet and Choice	Sara Wheeler
Teacher/Admin Quality	Retention	Melanie Cohen
	Recruitment	
	Alternative Certification	
	Professional Development	Lisa Duda
Gifted and Talented	Outcomes and Opportunities	

Action Steps and Implementation

- ▶ District administrators organize a committee of stakeholders for each strategy.
 - ▶ Parent or Guardian
 - ▶ Staff
 - ▶ Teacher
 - ▶ Administrator
 - ▶ Community member
 - ▶ Student (Student Achievement)
- ▶ Stakeholder committees review the strategy, current action steps, and relevant data.
- ▶ Based on the committee input, new action steps may be identified while existing action steps may be revised or discontinued.



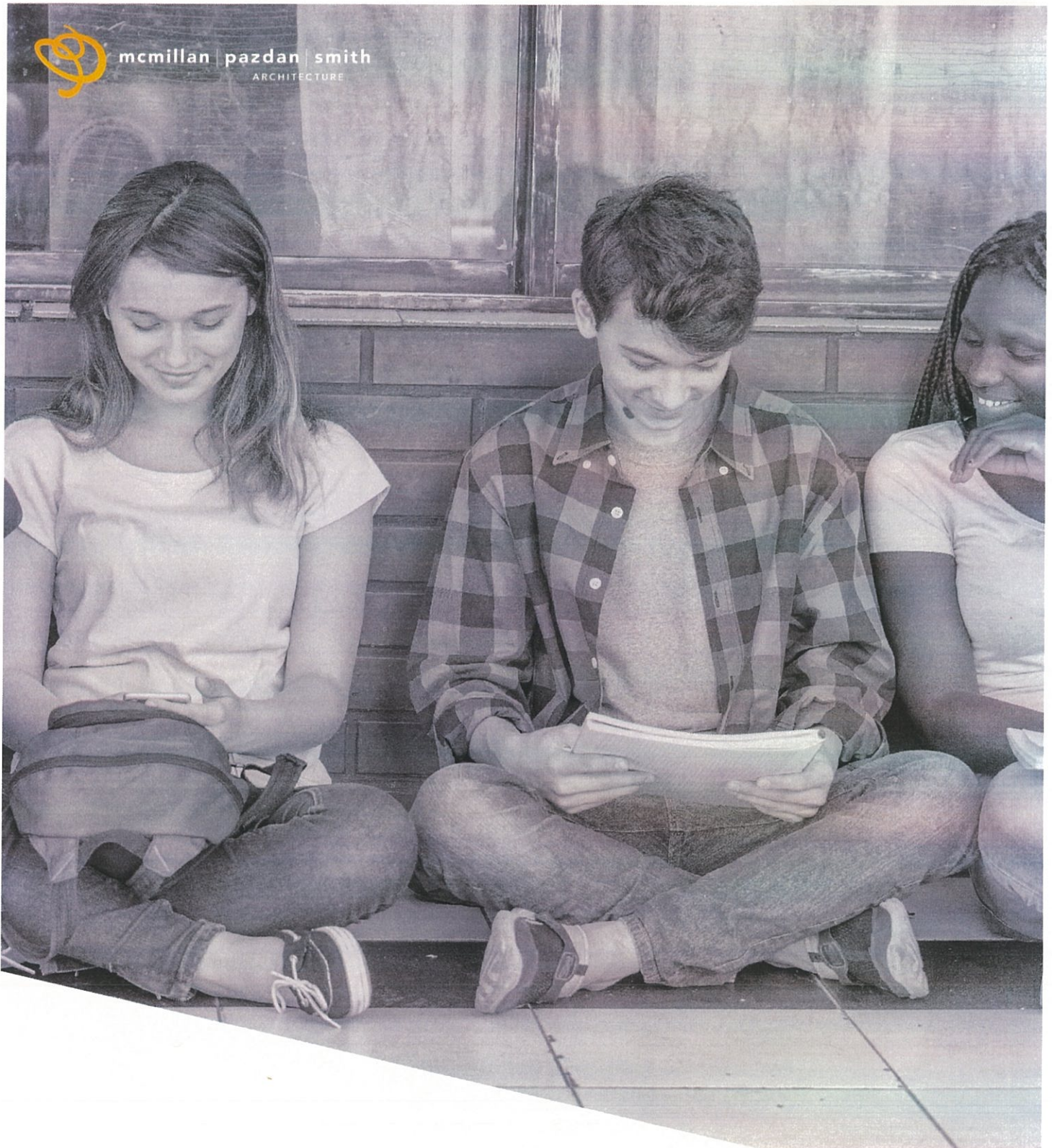
Annual Revision

- ▶ The document in the packet contains updated action steps for our annual submission to SCDE.
- ▶ We have made minor updates to the plan since the March 24 board meeting. Those updates are highlighted in yellow for your convenience.
- ▶ Further revisions will occur as the 2023-24 budget is finalized and approved. Those revisions will be included in the plan brought before the board at this time next year.

Recommendation: The administration recommends that the Board of Trustees approve the annual revisions to the Strategic Plan Amendments for 2022-23 to 2026-27.

Questions





**District Five of Lexington and Richland Counties
Population and Enrollment Forecasts**

August 17, 2023

McMillan Pazdan Smith

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EXECUTIVE SUMMARY

1. The resident total fertility rate for School District Five of Lexington and Richland Counties Hancock Central Schools over the life of the forecasts is below replacement level. (1.83 vs. the replacement level of 2.1)
2. Most in-migration to the district continues to occur in the 0-to-9 and 25-to-44-year-old age groups.
3. The local 18-to-24-year-old population continues to leave the district, going to college or moving to other urbanized areas. This population group accounts for the largest segment of the district's out migration flow and will increase steadily over the next 10 years. The second largest migration outflow is in the 70+ age groups.
4. The primary factors causing the district's enrollment to increase over the next five years is the slowing of the increase in empty nest households, the relatively high number of elderly housing units turning over coupled with a sustained rate of in-migration of young families.
5. Changes in year-to-year enrollment over the next ten years will primarily be due to small cohorts entering and moving through the school system in conjunction with larger cohorts leaving the system. The 12th grade class will average 1,417 students over the next 10 years, compared to 1,264 students over the last five years.
6. The elementary enrollment will slowly increase after the 2026-27 school year.
7. The median age of the district's population will increase from 40.4 in 2020 to 42.8 in 2030.
8. Even if the district continues to have a substantial amount of annual new housing unit construction over the next 10 years, the rate, magnitude, and price of existing home sales will become the increasingly dominant factor affecting the amount of population and enrollment change.
9. Total district enrollment is forecasted to increase by 695 students, or 4.0%, between 2022-23 and 2027-28. Total enrollment will decrease by 248 students, or-1.4%, from 2027-28 to 2032-33.

INTRODUCTION

By demographic principle, distinctions are made between projections and forecasts. A projection extrapolates the past (and present) into the future with little or no attempt to take into account any factors that may impact the extrapolation (e.g., changes in fertility rates, housing patterns or migration patterns) while a forecast results when a projection is modified by reasoning to take into account the aforementioned factors.

To maximize the use of this study as a planning tool, the ultimate goal is not simply to project the past into the future, but rather to assess various factors' impact on the future. The future population and enrollment change of each school district is influenced by a variety of factors. Not all factors will influence the entire school district or its attendance areas at the same level. Some may affect different areas at dissimilar magnitudes and rates causing changes at varying points of time within the same district. The forecaster's judgment, based on a thorough and intimate study of the district, has been used to modify the demographic trends and factors to predict likely changes more accurately. Therefore, strictly speaking, this study is a forecast, not a projection; and the amount of modification of the demographic trends varies between different areas of the district as well as within the timeframe of the forecast.

To calculate population forecasts of any type, particularly for smaller populations such as a school district or its attendance areas, realistic suppositions must be made as to what the future will bring in terms of age specific fertility,

mortality, and migration rates as well as the residents' demographic behavior at certain points of the life course. The demographic history of the school district and its interplay with the social and economic history of the area is the starting point and basis of most of these suppositions, particularly on key factors such as the age structure of the area. The unique nature of each district's and attendance area's demographic composition and rate of change over time must be assessed and understood to be factors throughout the life of the forecast series. Moreover, no two populations, particularly at the school district and attendance area level, have identical demographic characteristics or undergo demographics changes at exactly the same rate.

The manifest purpose of these forecasts is to ascertain the demographic factors that will ultimately influence the enrollment levels in the district's schools. There are of course, other non-demographic factors that affect enrollment levels over time. These factors include, but are not limited to transfer policies within the district; student transfers to and from neighboring districts; placement of "special programs" within school facilities that may serve students from outside the attendance area; state or federal mandates that dictate the movement of students from one facility to another (No Child Left Behind was an excellent example of this factor); the development of charter schools in the district; the prevalence of home schooling in the area; and the dynamics of local private schools.

Unless the district specifically requests the calculation of forecasts that reflect the effects of changes in these non-demographic factors, their influences are held constant for the life of the forecasts. Again, the main function of these forecasts is to determine what impact demographic changes will have on future enrollment. It is quite possible to calculate special “scenario” forecasts to measure the impact of school policy modifications, new state mandates as well as planned economic development and/or financial changes. However, in this case the results of these population and enrollment forecasts are meant to represent the most likely scenario for changes over the next 10 years in the district and its attendance areas.

The first part of the report will examine the assumptions made in calculating the population forecasts for School District Five of Lexington and Richland Counties. Since the results of the population forecasts drive the subsequent enrollment forecasts, the assumptions listed in this section are paramount to understanding the area’s demographic dynamics. The remainder of the report is an explanation and analysis of the district’s population forecasts and how they will shape the district’s grade level enrollment forecasts.

DATA

The data used for the forecasts come from a variety of sources. The School District Five of Lexington and Richland Counties provided enrollments by grade and attendance center for the school years 2017-18 to 2022-23. Birth

and death data for the years 2010 through 2020 were obtained from the South Carolina Department of Health. The net migration values were calculated using Internal Revenue Service migration reports for the years 2010 through 2020. The data used for the calculation of migration models came from the United States Bureau of the Census, 2005 to 2020, and the models were designed using demographic and economic factors. The base age-sex population counts used are from the results of the 2010 Census, calibrated to the 2020 Census results.

Recently the Census Bureau began releasing annual estimates of demographic variables at the block group and tract level from the American Community Survey (ACS). There has been wide scale reporting of these results in the national, state, and local media. However, due to the methodological problems the Census Bureau is experiencing with their estimates derived from ACS data, particularly in areas with a population of less than 60,000, (all of the elementary attendance areas in the district have less than 60,000 population) the results of the ACS are not used in these forecasts. For example, given the sampling framework used by the Census Bureau, each year only 1,200 of the over 41,000 current households in the district would have been included. For comparison 4,800 households in the district were included in the sample for the long form questionnaire in the 2000 Census. As a result of this small sample size, the ACS survey results from the last five years must be aggregated to produce the tract and block group estimates.

To develop the population forecast models, past migration patterns, current age specific fertility patterns, the magnitude and dynamics of the gross and net migration, the current age specific mortality trends, the distribution of the population by age and sex, the rate and type of existing housing unit sales, and future housing unit construction are considered primary variables. In addition, the change in household size relative to the age structure of the forecast area was addressed. While there was a slight drop in the average household size in the School District Five of Lexington and Richland Counties (persons per household in the district was 2.50 in 2020, compared to 2.55 in 2010) as well as most other areas of the country during the previous 20 years, the rate of this decline has been forecasted to slow over the next ten years.

ASSUMPTIONS

For these forecasts, the mortality probabilities are held constant at the levels calculated for the year 2018 (pre COVID-19 levels). While the number of deaths in an area are impacted by and will change given the proportion of the local population over age 65, in the absence of an extraordinary event such as a natural disaster or a breakthrough in the treatment of heart disease, death rates rarely move rapidly in any direction, particularly at the school district or attendance area level. Thus, significant changes are not foreseen in district's mortality rates between now and the year 2032. (At this point in time, there is insufficient data at the geographic and

age levels needed for these forecasts of the impacts of COVID-19 on mortality rates. We assume that most areas will return to their traditional mortality rate levels by 2023.) Any increases forecasted in the number of deaths will be due primarily to the general aging of the district's population and specifically to the increase in the number of residents aged 65 and older.

Similarly, fertility rates are assumed to stay fairly constant for the life of the forecasts. Like mortality rates, age specific fertility rates rarely change quickly or dramatically, particularly in small areas. Even with the recently reported drop in the fertility rates of the United States, overall fertility rates have stayed within a 10% range for most of the last 40 years. In fact, the vast majority of year-to-year change in an area's number of births is due to changes in the number of women in childbearing ages (particularly ages 20-29) rather than any fluctuation in an area's fertility rate. While there was a significant decline in the number of births in most regions of the United States in 2020 and 2021 due to the impact of COVID-19, we assume that after 2022 fertility rates will resume their pre COVID trends.

The **resident** total fertility rate (TFR), the average number of births a woman will have while living in the school district during her lifetime, is estimated to be 1.83 for the total district for the ten years of the population forecasts. A TFR of 2.1 births per woman is considered the theoretical "replacement level" of fertility necessary for a population to remain constant in the absence of in-migration. Therefore, in the absence of migration, fertility alone would be slightly below the level needed

to maintain the current level of population and enrollment within School District Five of Lexington and Richland Counties over the course of the forecast period. At the current TFR and given the number of women in prime childbearing age in the district (ages 20–34-year-old), the district will consistently see the number of total resident births be on average over 300 lower than the average enrollment in grade one.

A close examination of data for School District Five of Lexington and Richland Counties has shown the age specific pattern of net migration will be nearly constant throughout the life of the forecasts. While the number of in and out migrants has changed in past years for School District Five of Lexington and Richland Counties (and will change again over the next 10 years), the basic age pattern of the migrants has stayed nearly the same over the last 30 years. Based on the analysis of data it is safe to assume this age specific migration trend will remain unchanged into the future. This pattern of migration shows most of the local out-migration occurring in the 18-to-24-year-old age group as young adults leave the area to go to college or move to other urbanized areas. The second group of out-migrants is those householders aged 70 and older who are downsizing their residences. Most of the non-college in-migration occurs in the 0-to-9 and 25-44 age groups (the bulk of which come from areas within 100 miles of School District Five of Lexington and Richland Counties) primarily consisting of younger adults and their children.

As the Lexington and Richland Counties area is not currently contemplating any major expansions or contractions, the forecasts also assume

that the current economic, political, social, and environmental factors, as well as the transportation and public works infrastructure (with a few notable exceptions, such as the completion of the I-26 expansion) of School District Five of Lexington and Richland Counties and its attendance areas will remain the same through the year 2032. Below is a list of assumptions and issues that are specific to School District Five of Lexington and Richland Counties. These issues have been used to modify the population forecast models to predict the impact of these factors more accurately on each area's population change.

Specifically, the forecasts for School District Five of Lexington and Richland Counties assume that throughout the study period:

- a. The national, state, or regional economy does not go into deep recession at any time during the 10 years of the forecasts; (Deep recession is defined as four consecutive quarters where the GDP contracts greater than 1% per quarter)
- b. Interest rates have risen from their historic lows and will not fluctuate more than two percentage points in the short term; the interest rate for a 30-year fixed home mortgage stays between 5.0% and 7.0% for the 10 years of the forecasts;
- c. The rate of mortgage approval stays at 2022 levels and lenders do not return to “sub-prime” mortgage practices;

- | | |
|--|---|
| <ul style="list-style-type: none">d. There are no additional restrictions placed on home mortgage lenders or additional bankruptcies of major credit providers;e. The rate of housing foreclosures does not exceed 125% of the 2015-2020 average of Lexington and Richland Counties for any year in the forecasts;f. All currently planned, platted, approved, and permitted housing developments are built out and completed by 2031. All new housing units constructed are occupied by 2032. Speculative new home construction plans are not included;g. The average annual unemployment rates for the Lexington and Richland Counties and the Greater Columbia Metropolitan Area will remain below 7.5% for the 10 years of the forecasts;h. The intra-district student transfer policy remains unchanged over the next 10 years;i. The rate of students transferring out of the School District Five of Lexington and Richland Counties will remain at the 2018-19 to 2022-23 average;j. The inflation rate for gasoline will stay below 5% per year for the 10 years of the forecasts;k. The state of South Carolina does not change the current policy on | <ul style="list-style-type: none">open enrollment (unrestricted inter district transfers) or school vouchers anytime in the next 10 years;l. There will be no building moratorium within the district;m. Businesses within the district and the School District Five of Lexington and Richland Counties area will remain viable;n. There are no new charter schools opened in the district in the next decade or expansion of existing charter schools over the next 10 years;o. The number of existing home sales in the district that are a result of “distress sales” (homes worth less than the current mortgage value) will not exceed 20% of total homes sales in the district for any given year;p. Housing turnover rates (sale of existing homes in the district) will remain at their current levels. The majority of existing home sales are made by homeowners over the age of 60;q. The district will have at least an average of 1,600 existing home sales per year for the next 10 years;r. The district will have at least an average of 500 new single-family housing units constructed per year over the next 10 years;s. Private school, charter school and home school attendance |
|--|---|

rates will remain constant at 2022-23 levels;

- t. The rate of foreclosures for commercial property remains at the 2015-2020 average for Lexington and Richland Counties;
- u. The number of students engaging in virtual learning (both within and outside of the district) remains at the 2022-23 level.

If a major employer in the district or in the Lexington and Richland Counties or the Greater Columbia Metropolitan Area (particularly in western and northern parts of the metropolitan area) closes, reduces or expands its operations, the population forecasts would need to be adjusted to reflect the changes brought about by the change in economic and employment conditions. The same holds true for any type of natural disaster, major change in the local infrastructure (e.g., highway construction, water and sewer expansion, changes in zoning regulations etc.), a further economic downturn, any additional weakness in the existing housing market, another pandemic or any instance or situation that causes rapid and dramatic population changes that could not be foreseen at the time the forecasts were calculated.

The high proportion of high school graduates from School District Five of Lexington and Richland Counties that attend college or move to urban areas outside of the district for employment is a significant demographic factor. Their departure is a major reason for the

extremely high out-migration in the 18 to 24 age group and was taken into account when calculating these forecasts. The out-migration of graduating high school seniors is expected to continue over the period of the forecasts and the rate of out-migration has been forecasted to remain the same over the life of the forecast series.

Finally, all demographic trends (i.e., births, deaths, and migration) are assumed to be linear in nature and annualized over the forecast period. For example, if 1,000 births are forecasted for a 5-year period, an equal number, or proportion of the births are assumed to occur every year, 200 per year. Actual year-to-year variations do and will occur, but overall year-to-year trends are expected to be constant.

METHODOLOGY

The population forecasts presented in this report are the result of using the Cohort-Component Method of population forecasting (Siegel, and Swanson, 2004: 561-601) (Smith et. al. 2004). As stated in the **INTRODUCTION**, the difference between a projection and a forecast is in the use of explicit judgment based upon the unique features of the area under study. Strictly speaking, a cohort projection refers to the future population that would result if a mathematical extrapolation of historical trends. Conversely, a cohort-component forecast refers to the future population that is expected because of a studied and purposeful selection of the components of change (i.e., births, deaths, and migration) and forecast models are developed to

measure the impact of these changes in each specific geographic area.

Five sets of data are required to generate population and enrollment forecasts. These five data sets are:

- a. a base-year population (here, the 2010 Census population for the School District Five of Lexington and Richland Counties and its attendance areas);
- b. a set of age-specific fertility rates for the district to be used over the forecast period and its attendance areas;
- c. a set of age-specific survival (mortality) rates for the district and its attendance areas;
- d. a set of age-specific migration rates for the district and its attendance areas; and;
- e. the historical enrollment figures by grade.

The most significant and difficult aspect of producing enrollment forecasts is the generation of the population forecasts in which the school age population (and enrollment) is embedded. In turn, the most challenging aspect of generating the population forecasts is found in deriving the rates of change in fertility, mortality, and migration. From the standpoint of demographic analysis, School District Five of Lexington and Richland Counties is classified as a “small area” population (as compared to the population of the state of South Carolina or to that of the United States). Small area population forecasts

are more complicated to calculate because local variations in fertility, mortality, and migration may be more irregular than those at the regional, state, or national scale. Especially challenging is the forecast of the migration rates for local areas, because changes in the area's socioeconomic characteristics can quickly change from past and current patterns (Peters and Larkin, 2002.)

The population forecasts for School District Five of Lexington and Richland Counties were calculated using a cohort-component method with the populations divided into male and female groups by five-year age cohorts that range from 0-to-4 years of age to 85 years of age and older (85+). Age- and sex-specific fertility, mortality, and migration models were constructed to specifically reflect the unique demographic characteristics of each of the attendance areas in the School District Five of Lexington and Richland Counties.

The enrollment forecasts were calculated using a modified average survivorship method. Average survivor rates (i.e., the proportion of students who progress from one grade level to the next given the average amount of net migration for that grade level) over the previous five years of year-to-year enrollment data were calculated for grades two through twelve. This procedure is used to identify specific grades where there are large numbers of students changing facilities for non-demographic factors, such as private school transfers or enrollment in special programs.

The survivorship rates were modified or adjusted to reflect the

average rate of forecasted in and out migration of 5-to-9, 10-to-14 and 15-to-17-year-old cohorts to each of the attendance centers in School District Five of Lexington and Richland Counties for the period 2010 to 2015. These survivorship rates then were adjusted to reflect the forecasted changes in age-specific migration the district should experience over the next five years. These modified survivorship rates were used to project the enrollment of grades 2 through 12 for the period 2015 to 2020. The survivorship rates were adjusted again for the period 2020 to 2025 to reflect the predicted changes in the amount of age-specific migration in the district for the period.

The forecasted enrollments for kindergarten and first grade are derived from the 5-to-9-year-old population of the age-sex population forecast at the elementary attendance center district level. This procedure allows the changes in the incoming grade sizes to be factors of forecasted population change and not an extrapolation of previous class sizes. Given the potentially large amount of variation in kindergarten enrollment due to parental choice, changes in the state's minimum age requirement, and differing district policies on allowing children to start Kindergarten early, first grade enrollment is deemed to be a more accurate and reliable starting point for the forecasts. (McKibben, 1996) The level of accuracy for both the population and enrollment forecasts at the school district level is estimated to be no more than +/- 2.5% for the life of the forecasts.

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Appendix A: Supplemental Tables

Table 1: Forecasted Elementary Area Population Change, 2020 to 2030

	2020	2025	2020-2025 Change	2030	2025-2030 Change	2020-2030 Change
Ballentine	9,010	9,910	10.0%	10,610	7.1%	17.8%
Chapin	11,000	12,040	9.5%	12,740	5.8%	15.8%
Dutch Fork	7,980	7,870	-1.4%	7,720	-1.9%	-3.3%
H. E. Corley	6,990	7,160	2.4%	7,280	1.7%	4.1%
Harbison West	8,260	8,590	4.0%	8,800	2.4%	6.5%
Irmo	7,850	8,020	2.2%	8,080	0.7%	2.9%
Lake Murray	11,420	12,780	11.9%	13,640	6.7%	19.4%
Leaphart	7,820	7,640	-2.3%	7,390	-3.3%	-5.5%
Nursery Road	7,040	6,930	-1.6%	6,690	-3.5%	-5.0%
Oak Pointe	5,680	5,690	0.2%	5,630	-1.1%	-0.9%
Piney Woods	7,520	7,670	2.0%	7,830	2.1%	4.1%
River Springs	5,370	5,370	0.0%	5,350	-0.4%	-0.4%
Seven Oaks	7,630	7,400	-3.0%	7,170	-3.1%	-6.0%
District Total	103,570	107,070	3.4%	108,930	1.7%	5.2%

Table 2: Household Characteristics by Elementary Area, 2010 Census

	HH w/ Pop Under 18	% HH w/ Pop Under 18	Total Households	Household Population	Persons Per Household
Ballentine	1,004	46.2%	2,174	6,221	2.86
Chapin	1,163	37.7%	3,087	8,152	2.64
Dutch Fork	1,193	37.9%	3,151	8,051	2.55
H. E. Corley	1,020	43.2%	2,359	6,473	2.74
Harbison West	904	26.1%	3,458	7,562	2.19
Irmo	903	31.5%	2,872	7,126	2.48
Lake Murray	946	36.9%	2,562	6,838	2.67
Leaphart	939	27.2%	3,453	8,003	2.32
Nursery Road	938	34.8%	2,696	7,038	2.61
Oak Pointe	986	51.2%	1,924	5,621	2.92
Piney Woods	758	30.5%	2,486	6,317	2.54
River Springs	916	51.2%	1,791	5,314	2.97
Seven Oaks	1,029	28.8%	3,575	7,997	2.24
District Total	12,700	35.7%	35,588	90,711	2.55

Table 3: Householder Characteristics by Elementary Area, 2010 Census

	Percentage of Householders aged 35-54	Percentage of Householders aged 65+	Percentage of Householders who own homes
Ballentine	54.8%	16.0%	92.9%
Chapin	43.6%	23.1%	88.9%
Dutch Fork	44.6%	17.3%	86.6%
H. E. Corley	49.9%	9.6%	85.9%
Harbison West	36.2%	20.7%	50.9%
Irmo	42.1%	19.7%	79.7%
Lake Murray	45.0%	22.7%	92.9%
Leaphart	35.8%	26.3%	72.7%
Nursery Road	39.8%	20.7%	85.3%
Oak Pointe	58.5%	9.2%	92.7%
Piney Woods	39.1%	27.5%	92.2%
River Springs	58.3%	12.3%	92.9%
Seven Oaks	34.6%	19.4%	45.7%
District Total	43.3%	19.5%	79.0%

Table 4: Percentage of Households that are Single Person Households and Single Person Households that are over age 65 by Elementary Area, 2010 Census

	Percentage of Single Person Households	Percentage of Single Person Households and are 65+
Ballentine	14.8%	4.8%
Chapin	19.6%	8.4%
Dutch Fork	23.9%	6.5%
H. E. Corley	19.8%	3.4%
Harbison West	36.0%	11.4%
Irmo	21.6%	6.5%
Lake Murray	17.2%	7.3%
Leaphart	29.5%	11.3%
Nursery Road	17.3%	5.6%
Oak Pointe	14.6%	2.5%
Piney Woods	17.4%	7.2%
River Springs	14.4%	3.5%
Seven Oaks	34.1%	8.3%
District Total	22.8%	7.2%

Table 5: Elementary Enrollment (K-4), 2022, 2027, 2032

	2022	2027	2022-2027 Change	2032	2027-2032 Change	2022-2032 Change
Ballentine	441	401	-9.1%	419	4.5%	-5.0%
Chapin	708	669	-5.5%	673	0.6%	-4.9%
Dutch Fork	361	331	-8.3%	344	3.9%	-4.7%
H. E. Corley	396	399	0.8%	420	5.3%	6.1%
Harbison West	367	384	4.6%	402	4.7%	9.5%
Irmo	425	374	-12.0%	387	3.5%	-8.9%
Lake Murray	809	832	2.8%	802	-3.6%	-0.9%
Leaphart	388	412	6.2%	427	3.6%	10.1%
Nursery Road	339	330	-2.7%	348	5.5%	2.7%
Oak Pointe	398	403	1.3%	424	5.2%	6.5%
Piney Woods	501	564	12.6%	562	-0.4%	12.2%
River Springs	347	355	2.3%	381	7.3%	9.8%
Seven Oaks	402	396	-1.5%	409	3.3%	1.7%
District Total	5,882	5,850	-0.5%	5,998	2.5%	2.0%

Table 6: Age Under One to Age Ten Population Counts, by Year of Age, by Elementary Area: 2010 Census

	Under 1 year	1 year	2 years	3 years	4 years	5 years	6 years	7 years	8 years	9 years	10 years
Ballentine	50	75	72	82	97	96	118	117	113	123	109
Chapin	69	100	103	100	110	91	118	136	106	126	165
Dutch Fork	99	109	88	117	107	97	104	106	108	119	115
H. E. Corley	101	100	106	108	98	100	80	94	104	94	86
Harbison West	76	93	73	85	74	79	79	88	72	93	80
Irmo	88	79	66	92	77	68	75	93	78	88	77
Lake Murray	67	61	81	89	81	75	107	94	114	113	107
Leaphart	99	86	83	88	92	90	63	82	84	106	89
Nursery Road	74	75	65	89	80	75	75	69	85	88	93
Oak Pointe	88	67	86	84	89	117	101	124	115	84	97
Piney Woods	44	45	53	49	59	62	71	72	77	85	81
River Springs	52	63	68	87	83	103	103	100	106	134	103
Seven Oaks	99	106	103	96	108	101	99	110	91	100	95
District Total	1005	1059	1046	1166	1154	1152	1191	1284	1252	1351	1296

Appendix B: Population Forecasts

School District Five of Lexington and Richland Counties Total Population

	2010	2015	2020	2025	2030
0-4	5,430	6,060	6,150	5,970	5,430
5-9	6,230	6,420	6,890	6,950	6,890
10-14	6,738	6,670	6,780	7,140	7,110
15-19	6,466	6,120	6,150	6,270	6,740
20-24	4,468	4,740	4,710	4,460	4,540
25-29	5,239	5,570	5,720	5,440	5,160
30-34	5,430	6,360	6,530	6,730	6,150
35-39	6,229	7,580	8,250	7,880	7,730
40-44	6,774	7,290	8,420	8,830	8,490
45-49	7,561	6,600	7,150	8,270	8,700
50-54	7,208	7,390	6,470	6,990	8,110
55-59	6,380	6,780	6,950	6,120	6,670
60-64	5,834	5,890	6,300	6,460	5,710
65-69	4,101	5,280	5,340	5,670	5,870
70-74	2,672	3,830	4,780	4,810	5,170
75-79	1,886	2,330	3,360	4,190	4,230
80-84	1,247	1,520	1,880	2,740	3,390
85+	1,125	1,390	1,740	2,150	2,840
Total	91,018	97,820	103,570	107,070	108,930
Median Age	39.4	39.6	40.4	41.5	42.8
Births	5,070	5,290	5,220	5,000	
Deaths	2,940	3,520	4,120	4,830	
Natural Increase	2,130	1,770	1,100	170	
Net Migration	4,660	3,900	2,490	1,710	
Change	6,790	5,670	3,590	1,880	

Differences between period Totals may not equal Change due to rounding.

Ballentine Elementary Total Population

	2010	2015	2020	2025	2030
0-4	376	450	470	460	440
5-9	567	520	550	510	500
10-14	588	650	580	600	550
15-19	484	530	610	540	580
20-24	194	200	320	360	340
25-29	220	330	300	400	430
30-34	322	560	580	500	560
35-39	488	890	980	900	760
40-44	608	820	1,130	1,270	1,140
45-49	592	600	820	1,120	1,270
50-54	505	590	600	810	1,110
55-59	378	490	570	580	790
60-64	331	360	480	560	560
65-69	230	310	350	450	520
70-74	142	210	300	320	420
75-79	95	120	190	260	280
80-84	63	70	100	160	210
85+	38	60	80	110	150
Total	6,221	7,760	9,010	9,910	10,610
Median Age	38.7	38.6	40.5	42.7	45.0
Births	310	370	380	380	
Deaths	160	210	270	340	
Natural Increase	150	160	110	40	
Net Migration	1,420	1,040	810	660	
Change	1,570	1,200	920	700	

Differences between period Totals may not equal Change due to rounding.

Chapin Elementary Total Population

	2010	2015	2020	2025	2030
0-4	482	580	630	610	570
5-9	576	620	690	730	710
10-14	717	720	740	790	810
15-19	536	580	600	640	710
20-24	285	250	340	300	320
25-29	338	420	370	430	380
30-34	413	760	780	750	720
35-39	539	970	1,220	1,160	1,040
40-44	648	820	1,190	1,400	1,360
45-49	689	640	800	1,180	1,390
50-54	651	680	630	790	1,170
55-59	599	640	660	620	770
60-64	525	580	620	640	600
65-69	364	500	550	590	610
70-74	301	330	470	510	540
75-79	201	260	300	410	440
80-84	134	170	210	250	320
85+	155	170	200	240	280
Total	8,152	9,690	11,000	12,040	12,740
Median Age	41.5	39.7	40.5	42.2	44.1
Births	440	520	510	500	
Deaths	310	370	430	500	
Natural Increase	130	150	80	0	
Net Migration	1,390	1,180	950	720	
Change	1,520	1,330	1,030	720	

Differences between period Totals may not equal Change due to rounding.

Dutch Fork Elementary Total Population

	2010	2015	2020	2025	2030
0-4	519	440	410	390	360
5-9	534	560	470	470	440
10-14	590	530	560	470	470
15-19	606	510	460	500	420
20-24	409	420	330	320	370
25-29	511	450	450	360	350
30-34	559	550	480	480	380
35-39	580	590	580	500	500
40-44	619	580	590	570	500
45-49	657	620	570	580	570
50-54	626	650	600	570	580
55-59	562	580	600	560	530
60-64	466	510	520	550	520
65-69	303	410	450	460	500
70-74	220	280	380	390	410
75-79	154	190	250	330	340
80-84	93	120	160	200	270
85+	52	90	120	170	210
Total	8,059	8,080	7,980	7,870	7,720
Median Age	37.6	39.9	42.1	43.9	45.6
Births	400	380	360	340	
Deaths	220	270	320	370	
Natural Increase	180	110	40	-30	
Net Migration	-190	-180	-140	-130	
Change	-10	-70	-100	-160	

Differences between period Totals may not equal Change due to rounding.

HE Corley Elementary Total Population

	2010	2015	2020	2025	2030
0-4	512	470	450	430	410
5-9	471	520	470	470	480
10-14	514	470	520	470	460
15-19	539	490	450	500	450
20-24	382	480	440	400	430
25-29	545	400	490	440	400
30-34	521	550	400	490	450
35-39	505	530	560	400	500
40-44	498	500	520	560	400
45-49	495	490	500	520	560
50-54	511	490	490	500	520
55-59	365	480	470	470	480
60-64	262	340	460	450	440
65-69	151	240	320	430	410
70-74	89	140	220	280	390
75-79	67	80	120	190	250
80-84	30	50	60	100	160
85+	18	30	50	60	90
Total	6,473	6,750	6,990	7,160	7,280
Median Age	32.6	35.0	37.5	39.8	40.8
Births	450	440	420	400	
Deaths	120	150	190	240	
Natural Increase	330	290	230	160	
Net Migration	-60	-50	-40	-40	
Change	270	240	190	120	

Differences between period Totals may not equal Change due to rounding.

Harbison West Elementary Total Population

	2010	2015	2020	2025	2030
0-4	401	470	490	530	490
5-9	410	450	500	530	570
10-14	434	410	450	500	530
15-19	509	510	490	510	550
20-24	560	680	670	620	610
25-29	685	770	870	830	750
30-34	531	340	440	610	610
35-39	497	520	340	440	610
40-44	423	500	520	340	440
45-49	543	420	480	520	340
50-54	553	540	420	480	510
55-59	526	540	520	400	470
60-64	512	510	520	510	400
65-69	356	480	490	500	480
70-74	192	330	450	450	470
75-79	169	170	290	400	400
80-84	132	140	140	230	320
85+	141	160	180	190	250
Total	7,570	7,940	8,260	8,590	8,800
Median Age	37.6	38.3	38.2	36.9	37.4
Births	420	460	510	470	
Deaths	270	310	350	410	
Natural Increase	150	150	160	60	
Net Migration	210	200	160	140	
Change	360	350	320	200	

Differences between period Totals may not equal Change due to rounding.

Irmo Elementary Total Population

	2010	2015	2020	2025	2030
0-4	402	450	430	390	390
5-9	401	550	490	460	420
10-14	437	400	550	490	460
15-19	498	390	350	510	470
20-24	341	260	260	210	250
25-29	347	430	340	320	310
30-34	386	440	570	500	420
35-39	418	480	620	690	600
40-44	473	460	480	610	730
45-49	630	460	460	470	600
50-54	700	620	460	450	470
55-59	625	690	610	460	450
60-64	561	600	660	590	440
65-69	381	530	530	600	550
70-74	221	360	450	460	550
75-79	142	200	310	390	410
80-84	93	110	160	250	320
85+	71	90	120	170	240
Total	7,126	7,520	7,850	8,020	8,080
Median Age	43.5	43.9	43.3	43.6	44.9
Births	410	390	360	370	
Deaths	240	300	360	430	
Natural Increase	170	90	0	-60	
Net Migration	240	220	150	130	
Change	410	310	150	70	

Differences between period Totals may not equal Change due to rounding.

Lake Murray Elementary Total Population

	2010	2015	2020	2025	2030
0-4	380	650	760	690	650
5-9	503	590	830	870	850
10-14	514	710	790	950	950
15-19	462	430	640	670	870
20-24	233	250	240	280	270
25-29	248	450	440	350	350
30-34	309	680	830	920	660
35-39	504	1,030	1,330	1,310	1,220
40-44	497	920	1,410	1,550	1,530
45-49	656	490	920	1,400	1,540
50-54	569	650	490	910	1,380
55-59	518	550	630	470	890
60-64	499	500	530	620	460
65-69	348	470	480	510	580
70-74	235	330	440	440	470
75-79	162	210	280	380	390
80-84	150	140	160	230	310
85+	218	220	220	230	270
Total	7,003	9,270	11,420	12,780	13,640
Median Age	43.5	39.2	39.4	41.1	43.3
Births	430	570	570	580	
Deaths	310	350	400	470	
Natural Increase	120	220	170	110	
Net Migration	2,130	1,940	1,190	780	
Change	2,250	2,160	1,360	890	

Differences between period Totals may not equal Change due to rounding.

Leaphart Elementary Total Population

	2010	2015	2020	2025	2030
0-4	448	460	430	390	340
5-9	425	470	490	500	530
10-14	478	420	470	490	500
15-19	484	420	370	430	440
20-24	427	350	290	250	270
25-29	564	450	370	310	270
30-34	512	590	470	390	340
35-39	479	530	610	500	410
40-44	515	470	530	600	490
45-49	571	510	470	530	600
50-54	616	560	500	460	520
55-59	548	570	530	470	440
60-64	593	500	530	460	410
65-69	473	540	450	460	390
70-74	312	440	470	390	400
75-79	286	270	390	420	350
80-84	152	230	220	320	340
85+	121	160	230	270	350
Total	8,003	7,940	7,820	7,640	7,390
Median Age	41.8	43.0	43.9	44.7	45.9
Births	430	380	350	320	
Deaths	320	380	420	470	
Natural Increase	110	0	-70	-150	
Net Migration	-140	-130	-120	-110	
Change	-30	-130	-190	-260	

Differences between period Totals may not equal Change due to rounding.

Nursesey Road Elementary Total Population

	2010	2015	2020	2025	2030
0-4	383	390	390	360	320
5-9	392	400	410	410	400
10-14	502	390	400	410	410
15-19	579	450	350	360	370
20-24	340	470	350	250	220
25-29	326	360	490	370	270
30-34	335	350	380	510	390
35-39	395	350	370	400	530
40-44	425	390	350	370	400
45-49	557	420	390	350	360
50-54	641	550	420	390	340
55-59	663	610	520	400	370
60-64	616	620	560	460	370
65-69	403	570	560	500	410
70-74	245	380	500	530	460
75-79	119	220	330	440	460
80-84	66	100	170	270	360
85+	51	60	100	150	250
Total	7,038	7,080	7,040	6,930	6,690
Median Age	43.1	44.9	45.4	45.4	45.5
Births	360	340	320	300	
Deaths	220	280	350	420	
Natural Increase	140	60	-30	-120	
Net Migration	-110	-110	-100	-100	
Change	30	-50	-130	-220	

Differences between period Totals may not equal Change due to rounding.

Oak Pointe Elementary Total Population

	2010	2015	2020	2025	2030
0-4	413	420	380	380	290
5-9	540	460	490	460	450
10-14	522	540	460	490	460
15-19	460	440	470	400	430
20-24	194	210	230	240	220
25-29	281	230	240	260	280
30-34	412	320	270	270	280
35-39	538	450	350	290	290
40-44	553	530	450	350	290
45-49	524	550	530	450	350
50-54	412	520	550	530	440
55-59	274	360	470	530	490
60-64	212	220	320	400	480
65-69	128	160	180	240	360
70-74	55	120	110	160	220
75-79	48	40	100	100	140
80-84	33	40	40	90	80
85+	22	30	40	50	80
Total	5,621	5,640	5,680	5,690	5,630
Median Age	34.9	37.2	39.3	40.8	42.0
Births	340	310	300	270	
Deaths	100	120	140	180	
Natural Increase	240	190	160	90	
Net Migration	-210	-170	-140	-130	
Change	30	20	20	-40	

Differences between period Totals may not equal Change due to rounding.

Piney Woods Elementary Total Population

	2010	2015	2020	2025	2030
0-4	250	440	470	490	390
5-9	367	440	590	650	640
10-14	446	430	460	620	680
15-19	448	380	370	420	590
20-24	204	200	210	210	380
25-29	179	260	260	240	240
30-34	231	300	380	280	270
35-39	355	420	470	400	310
40-44	456	480	530	470	400
45-49	572	450	480	520	460
50-54	540	570	450	460	510
55-59	592	530	550	430	460
60-64	601	570	510	530	420
65-69	466	570	550	480	510
70-74	288	440	530	500	450
75-79	152	250	380	460	450
80-84	112	120	200	310	380
85+	70	110	130	200	290
Total	6,326	6,960	7,520	7,670	7,830
Median Age	47.0	46.4	45.2	45.5	45.2
Births	260	300	300	310	
Deaths	260	320	390	470	
Natural Increase	0	-20	-90	-160	
Net Migration	620	570	310	260	
Change	620	550	220	100	

Differences between period Totals may not equal Change due to rounding.

River Springs Elementary Total Population

	2010	2015	2020	2025	2030
0-4	354	350	350	360	350
5-9	545	380	440	420	430
10-14	542	540	380	430	400
15-19	405	490	490	330	390
20-24	188	220	290	300	210
25-29	195	220	260	310	330
30-34	270	220	240	280	330
35-39	456	300	220	270	280
40-44	564	450	290	220	260
45-49	518	560	450	290	220
50-54	389	510	560	450	290
55-59	287	350	470	520	410
60-64	228	250	310	430	480
65-69	153	190	210	270	380
70-74	94	140	170	170	230
75-79	68	80	130	150	140
80-84	33	50	60	100	120
85+	28	40	50	70	100
Total	5,314	5,340	5,370	5,370	5,350
Median Age	36.7	39.2	40.3	39.7	39.2
Births	290	290	310	300	
Deaths	110	140	170	200	
Natural Increase	180	150	140	100	
Net Migration	-150	-140	-130	-120	
Change	30	10	10	-20	

Differences between period Totals may not equal Change due to rounding.

Seven Oaks Elementary Total Population

	2010	2015	2020	2025	2030
0-4	512	490	490	490	430
5-9	501	460	470	470	470
10-14	455	460	420	430	430
15-19	456	500	500	460	470
20-24	711	750	740	720	650
25-29	802	800	840	820	800
30-34	629	700	710	750	740
35-39	476	520	600	620	680
40-44	497	370	430	520	550
45-49	559	390	280	340	440
50-54	495	460	300	190	270
55-59	444	390	350	210	120
60-64	428	330	280	260	130
65-69	347	310	220	180	170
70-74	279	330	290	210	160
75-79	224	240	290	260	180
80-84	158	180	200	230	200
85+	141	170	220	240	280
Total	8,114	7,850	7,630	7,400	7,170
Median Age	34.9	33.3	32.5	32.1	32.3
Births	530	540	530	460	
Deaths	300	320	330	330	
Natural Increase	230	220	200	130	
Net Migration	-490	-470	-410	-350	
Change	-260	-250	-210	-220	

Differences between period Totals may not equal Change due to rounding.

Appendix C: Enrollment Forecasts

School District Five of Lexington and Richland Counties: Total Enrollment

	2019- 20	2020- 21	2021- 22	2022- 23	2023- 24	2024- 25	2025- 26	2026- 27	2027- 28	2028- 29	2029- 30	2030- 31	2031- 32	2032- 33
PK	545	381	480	502	502	502	502	502	502	502	502	502	502	502
K	1068	1051	1038	1052	1062	1086	1073	1061	1083	1099	1117	1135	1150	1166
1	1144	1062	1173	1112	1123	1144	1167	1146	1130	1146	1159	1172	1184	1195
2	1200	1112	1170	1233	1154	1163	1180	1201	1172	1153	1166	1178	1189	1199
3	1266	1119	1164	1242	1266	1186	1193	1210	1225	1197	1178	1190	1200	1211
4	1273	1250	1201	1243	1279	1304	1224	1231	1240	1255	1226	1208	1216	1227
5	924	860	856	847	766	831	843	732	755	766	780	769	762	774
Total PK-5	7420	6835	7082	7231	7152	7216	7182	7083	7107	7118	7128	7154	7203	7274
5	377	401	440	415	509	473	483	510	489	483	481	466	455	450
6	1293	1262	1295	1339	1304	1338	1332	1359	1295	1268	1270	1281	1259	1239
Total: 5-6	1670	1663	1735	1754	1813	1811	1815	1869	1784	1751	1751	1747	1714	1689
7	1491	1296	1356	1392	1448	1408	1426	1445	1461	1371	1365	1365	1373	1345
8	1401	1466	1352	1388	1427	1486	1447	1469	1484	1501	1411	1398	1393	1404
Total: 7-8	2892	2762	2708	2780	2875	2894	2873	2914	2945	2872	2776	2763	2766	2749
9	1503	1490	1671	1626	1647	1691	1756	1714	1726	1752	1772	1664	1654	1648
10	1453	1407	1460	1555	1551	1570	1613	1676	1635	1653	1674	1692	1590	1579
11	1342	1390	1346	1318	1461	1457	1475	1517	1578	1539	1562	1577	1593	1501
12	1266	1263	1279	1238	1237	1370	1365	1382	1422	1480	1443	1468	1494	1509
Total: 9-12	5564	5550	5756	5737	5896	6088	6209	6289	6361	6424	6451	6401	6331	6237
Total PK-12	17546	16810	17281	17502	17736	18009	18079	18155	18197	18165	18106	18065	18014	17949
Total PK-12	17546	16810	17281	17502	17736	18009	18079	18155	18197	18165	18106	18065	18014	17949
Change		-736	471	221	234	273	70	76	42	-32	-59	-41	-51	-65
%-Change		-4.2%	2.8%	1.3%	1.3%	1.5%	0.4%	0.4%	0.2%	-0.2%	-0.3%	-0.2%	-0.3%	-0.4%
Total: PK-5	7420	6835	7082	7231	7152	7216	7182	7083	7107	7118	7128	7154	7203	7274
Change		-585	247	149	-79	64	-34	-99	24	11	10	26	49	71
%-Change		-7.9%	3.6%	2.1%	-1.1%	0.9%	-0.5%	-1.4%	0.3%	0.2%	0.1%	0.4%	0.7%	1.0%
Total: 5-6	1670	1663	1735	1754	1813	1811	1815	1869	1784	1751	1751	1747	1714	1689
Change		-7	72	19	59	-2	4	54	-85	-33	0	-4	-33	-25
%-Change		-0.4%	4.3%	1.1%	3.4%	-0.1%	0.2%	3.0%	-4.5%	-1.8%	0.0%	-0.2%	-1.9%	-1.5%
Total: 7-8	2892	2762	2708	2780	2875	2894	2873	2914	2945	2872	2776	2763	2766	2749
Change		-130	-54	72	95	19	-21	41	31	-73	-96	-13	3	-17
%-Change		-4.5%	-2.0%	2.7%	3.4%	0.7%	-0.7%	1.4%	1.1%	-2.5%	-3.3%	-0.5%	0.1%	-0.6%
Total: 9-12	5564	5550	5756	5737	5896	6088	6209	6289	6361	6424	6451	6401	6331	6237
Change		-14	206	-19	159	192	121	80	72	63	27	-50	-70	-94
%-Change		-0.3%	3.7%	-0.3%	2.8%	3.3%	2.0%	1.3%	1.1%	1.0%	0.4%	-0.8%	-1.1%	-1.5%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Irmo Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	44	24	21	23	23	23	23	23	23	23	23	23	23	23
K	82	92	73	68	69	70	69	70	70	71	72	75	76	77
1	89	88	94	80	72	73	74	72	73	73	74	75	77	78
2	84	81	88	100	82	73	75	76	74	75	74	75	76	78
3	83	85	81	94	101	83	75	77	78	76	77	75	76	77
4	103	73	99	83	95	102	85	77	79	80	78	78	76	77
5	98	108	68	96	84	96	105	87	79	81	82	79	79	77
Total PK-5	583	551	524	544	526	520	506	482	476	479	480	480	483	487
Total PK-5	583	551	524	544	526	520	506	482	476	479	480	480	483	487
Change		-32	-27	20	-18	-6	-14	-24	-6	3	1	0	3	4
%-Change		-5.5%	-4.9%	3.8%	-3.3%	-1.1%	-2.7%	-4.7%	-1.2%	0.6%	0.2%	0.0%	0.6%	0.8%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Leaphart Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	20	14	20	22	22	22	22	22	22	22	22	22	22	22
K	63	65	69	75	77	78	78	77	80	81	81	82	83	81
1	72	65	69	73	79	81	82	81	80	82	83	84	85	86
2	81	70	68	76	74	81	82	83	82	81	83	84	85	86
3	91	63	74	86	79	77	83	84	85	84	83	85	86	87
4	76	85	72	78	88	81	78	84	85	86	85	84	86	87
5	82	73	98	84	80	90	83	78	85	87	88	86	85	87
Total PK-5	485	435	470	494	499	510	508	509	519	523	525	527	532	536
Total PK-5	485	435	470	494	499	510	508	509	519	523	525	527	532	536
Change		-50	35	24	5	11	-2	1	10	4	2	2	5	4
%-Change		-10%	8.0%	5.1%	1.0%	2.2%	-0.4%	0.2%	2.0%	0.8%	0.4%	0.4%	0.9%	0.8%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Nursey Road Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	43	32	39	39	39	39	39	39	39	39	39	39	39	39
K	58	65	71	58	62	65	64	62	64	65	67	68	69	71
1	68	62	76	73	63	66	68	67	65	67	68	70	71	72
2	84	57	67	75	74	64	67	69	68	66	68	69	69	70
3	70	72	59	66	74	73	63	66	68	67	65	69	68	68
4	78	67	71	67	65	73	72	62	65	67	66	66	68	67
5	62	69	72	73	68	66	74	73	63	66	68	68	67	69
Total PK-5	463	424	455	451	445	446	447	438	432	437	441	449	451	456
Total PK-5	463	424	455	451	445	446	447	438	432	437	441	449	451	456
Change		-39	31	-4	-6	1	1	-9	-6	5	4	8	2	5
%-Change		-8.4%	7.3%	-0.9%	-1.3%	0.2%	0.2%	-2.0%	-1.4%	1.2%	0.9%	1.8%	0.4%	1.1%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Seven Oaks Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	41	27	42	43	43	43	43	43	43	43	43	43	43	43
K	66	62	68	81	76	77	76	75	77	78	80	81	82	83
1	89	59	74	79	83	83	84	82	80	81	82	83	84	85
2	90	72	81	77	77	81	81	83	81	79	80	81	82	83
3	89	75	75	84	75	75	79	79	81	79	78	79	80	80
4	83	87	73	81	83	74	74	78	77	79	77	76	77	78
5	88	81	91	78	80	82	73	73	77	76	78	76	75	76
Total PK-5	546	463	504	523	517	515	510	513	516	515	518	519	523	528
Total PK-5	546	463	504	523	517	515	510	513	516	515	518	519	523	528
Change		-83	41	19	-6	-2	-5	3	3	-1	3	1	4	5
%-Change		-15%	8.9%	3.8%	-1.1%	-0.4%	-1.0%	0.6%	0.6%	-0.2%	0.6%	0.2%	0.8%	1.0%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Harbison West Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	85	63	77	89	89	89	89	89	89	89	89	89	89	89
K	72	71	77	67	70	72	70	69	72	73	74	76	78	76
1	60	65	71	65	74	76	78	76	75	77	78	79	81	82
2	107	81	92	75	71	79	81	81	78	77	79	79	80	82
3	84	99	70	85	74	70	77	79	79	79	78	80	80	81
4	110	85	97	75	87	75	71	78	80	80	80	79	81	81
5	101	103	87	94	76	88	74	70	77	79	79	79	78	80
Total PK-5	619	567	571	550	541	549	540	542	550	554	557	561	567	571
Total PK-5	619	567	571	550	541	549	540	542	550	554	557	561	567	571
Change		-52	4	-21	-9	8	-9	2	8	4	3	4	6	4
%-Change		-8.4%	0.7%	-3.7%	-1.6%	1.5%	-1.6%	0.4%	1.5%	0.7%	0.5%	0.7%	1.1%	0.7%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Crossroads Middle School: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
6	723	708	701	698	695	628	681	691	600	619	628	640	631	625
Total 6	723	708	701	698	695	628	681	691	600	619	628	640	631	625
Total 6	723	708	701	698	695	628	681	691	600	619	628	640	631	625
Change		-15	-7	-3	-3	-67	53	10	-91	19	9	12	-9	-6
%-Change		-2.1%	-1.0%	-0.4%	-0.4%	-9.6%	8.4%	1.5%	-13%	3.2%	1.5%	1.9%	-1.4%	-1.0%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Irmo Middle School: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
6	137	140	124	135	136	136	122	133	135	117	121	122	125	123
7	467	393	439	448	440	438	396	429	435	378	390	396	403	398
8	412	431	402	428	444	436	442	400	431	437	380	392	394	401
Total 6-8	1016	964	965	1011	1020	1010	960	962	1001	932	891	910	922	922
Total 6-8	1016	964	965	1011	1020	1010	960	962	1001	932	891	910	922	922
Change		-52	1	46	9	-10	-50	2	39	-69	-41	19	12	0
%-Change		-5.1%	0.1%	4.8%	0.9%	-1.0%	-5.0%	0.2%	4.1%	-6.9%	-4.4%	2.1%	1.3%	0.0%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Irmo High School: Total Enrollment

	2019- 20	2020- 21	2021- 22	2022- 23	2023- 24	2024- 25	2025- 26	2026- 27	2027- 28	2028- 29	2029- 30	2030- 31	2031- 32	2032- 33
9	366	353	458	409	432	448	440	446	404	435	441	384	396	398
10	310	311	315	366	372	393	408	400	406	368	396	401	349	360
11	307	291	309	269	337	342	362	375	368	374	339	364	369	321
12	280	261	255	263	245	307	311	329	341	335	340	308	331	336
Total 9-12	1263	1216	1337	1307	1386	1490	1521	1550	1519	1512	1516	1457	1445	1415
Total 9-12	1263	1216	1337	1307	1386	1490	1521	1550	1519	1512	1516	1457	1445	1415
Change		-47	121	-30	79	104	31	29	-31	-7	4	-59	-12	-30
%-Change		-3.7%	10%	-2.2%	6.0%	7.5%	2.1%	1.9%	-2.0%	-0.5%	0.3%	-3.9%	-0.8%	-2.1%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Irmo Cluster: Total Enrollment

	2019- 20	2020- 21	2021- 22	2022- 23	2023- 24	2024- 25	2025- 26	2026- 27	2027- 28	2028- 29	2029- 30	2030- 31	2031- 32	2032- 33
PK	233	160	199	216	216	216	216	216	216	216	216	216	216	216
K	341	355	358	349	354	362	357	353	363	368	374	382	388	388
1	378	339	384	370	371	379	386	378	373	380	385	391	398	403
2	446	361	396	403	378	378	386	392	383	378	384	388	392	399
3	417	394	359	415	403	378	377	385	391	385	381	388	390	393
4	450	397	412	384	418	405	380	379	386	392	386	383	388	390
5	431	434	416	425	388	422	409	381	381	389	395	388	384	389
Total PK-5	2696	2440	2524	2562	2528	2540	2511	2484	2493	2508	2521	2536	2556	2578
6	860	848	825	833	831	764	803	824	735	736	749	762	756	748
7	467	393	439	448	440	438	396	429	435	378	390	396	403	398
8	412	431	402	428	444	436	442	400	431	437	380	392	394	401
Total: 6-8	1739	1672	1666	1709	1715	1638	1641	1653	1601	1551	1519	1550	1553	1547
9	366	353	458	409	432	448	440	446	404	435	441	384	396	398
10	310	311	315	366	372	393	408	400	406	368	396	401	349	360
11	307	291	309	269	337	342	362	375	368	374	339	364	369	321
12	280	261	255	263	245	307	311	329	341	335	340	308	331	336
Total: 9-12	1263	1216	1337	1307	1386	1490	1521	1550	1519	1512	1516	1457	1445	1415
Total PK-12	5698	5328	5527	5578	5629	5668	5673	5687	5613	5571	5556	5543	5554	5540
Total PK-12	5698	5328	5527	5578	5629	5668	5673	5687	5613	5571	5556	5543	5554	5540
Change		-370	199	51	51	39	5	14	-74	-42	-15	-13	11	-14
%-Change		-6.5%	3.7%	0.9%	0.9%	0.7%	0.1%	0.2%	-1.3%	-0.7%	-0.3%	-0.2%	0.2%	-0.3%
Total: PK-5	2696	2440	2524	2562	2528	2540	2511	2484	2493	2508	2521	2536	2556	2578
Change		-256	84	38	-34	12	-29	-27	9	15	13	15	20	22
%-Change		-9.5%	3.4%	1.5%	-1.3%	0.5%	-1.1%	-1.1%	0.4%	0.6%	0.5%	0.6%	0.8%	0.9%
Total: 6-8	1739	1672	1666	1709	1715	1638	1641	1653	1601	1551	1519	1550	1553	1547
Change		-67	-6	43	6	-77	3	12	-52	-50	-32	31	3	-6
%-Change		-3.9%	-0.4%	2.6%	0.4%	-4.5%	0.2%	0.7%	-3.1%	-3.1%	-2.1%	2.0%	0.2%	-0.4%
Total: 9-12	1263	1216	1337	1307	1386	1490	1521	1550	1519	1512	1516	1457	1445	1415
Change		-47	121	-30	79	104	31	29	-31	-7	4	-59	-12	-30
%-Change		-3.7%	10%	-2.2%	6.0%	7.5%	2.1%	1.9%	-2.0%	-0.5%	0.3%	-3.9%	-0.8%	-2.1%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Lake Murray Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	7	4	4	7	7	7	7	7	7	7	7	7	7	7
K	169	144	145	152	147	147	145	143	145	148	149	148	149	152
1	179	175	142	146	159	161	162	159	157	158	159	158	156	155
2	167	186	174	158	159	172	172	172	167	163	163	162	161	159
3	210	174	165	166	164	165	177	177	177	172	168	166	165	164
4	199	215	171	187	174	172	173	186	186	186	181	175	173	172
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total PK-5	931	898	801	816	810	824	836	844	839	834	827	816	811	809
Total PK-5	931	898	801	816	810	824	836	844	839	834	827	816	811	809
Change		-33	-97	15	-6	14	12	8	-5	-5	-7	-11	-5	-2
%-Change		-3.5%	-11%	1.9%	-0.7%	1.7%	1.5%	1.0%	-0.6%	-0.6%	-0.8%	-1.3%	-0.6%	-0.2%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Piney Woods Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	0	0	3	2	2	2	2	2	2	2	2	2	2	2
K	0	0	82	90	95	98	98	99	101	103	104	105	107	110
1	0	0	82	106	101	104	108	107	106	107	108	109	110	111
2	0	0	81	95	116	109	111	114	112	110	110	110	111	112
3	0	0	87	100	103	125	117	118	120	116	113	112	112	113
4	0	0	85	110	108	111	134	125	125	127	122	119	116	116
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total PK-5	0	0	420	503	525	549	570	565	566	565	559	557	558	564
Total PK-5	0	0	420	503	525	549	570	565	566	565	559	557	558	564
Change				83	22	24	21	-5	1	-1	-6	-2	1	6
%-Change				20%	4.4%	4.6%	3.8%	-0.9%	0.2%	-0.2%	-1.1%	-0.4%	0.2%	1.1%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Chapin Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	78	73	81	90	90	90	90	90	90	90	90	90	90	90
K	140	143	119	115	120	122	123	121	123	123	125	127	128	131
1	164	150	140	144	126	128	130	129	127	128	128	129	130	131
2	146	163	124	146	150	131	134	137	133	131	132	132	133	134
3	169	150	153	141	152	156	138	141	141	137	135	136	136	137
4	160	188	117	162	148	160	165	146	145	145	141	139	140	140
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total PK-5	857	867	734	798	786	787	780	764	759	754	751	753	757	763
Total PK-5	857	867	734	798	786	787	780	764	759	754	751	753	757	763
Change		10	-133	64	-12	1	-7	-16	-5	-5	-3	2	4	6
%-Change		1.2%	-15%	8.7%	-1.5%	0.1%	-0.9%	-2.1%	-0.7%	-0.7%	-0.4%	0.3%	0.5%	0.8%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Chapin Intermediate School: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
5	377	401	440	415	509	473	483	510	489	483	481	466	455	450
6	428	410	466	502	469	570	525	531	556	528	517	515	499	487
Total 5-6	805	811	906	917	978	1043	1008	1041	1045	1011	998	981	954	937
Total 5-6	805	811	906	917	978	1043	1008	1041	1045	1011	998	981	954	937
Change		6	95	11	61	65	-35	33	4	-34	-13	-17	-27	-17
%-Change		0.7%	12%	1.2%	6.7%	6.6%	-3.4%	3.3%	0.4%	-3.3%	-1.3%	-1.7%	-2.8%	-1.8%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Chapin Middle School: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
7	513	452	460	495	547	511	616	567	573	600	570	558	551	534
8	494	521	483	492	525	580	537	647	595	602	630	593	580	576
Total 7-8	1007	973	943	987	1072	1091	1153	1214	1168	1202	1200	1151	1131	1110
Total 7-8	1007	973	943	987	1072	1091	1153	1214	1168	1202	1200	1151	1131	1110
Change		-34	-30	44	85	19	62	61	-46	34	-2	-49	-20	-21
%-Change		-3.4%	-3.1%	4.7%	8.6%	1.8%	5.7%	5.3%	-3.8%	2.9%	-0.2%	-4.1%	-1.7%	-1.9%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Chapin High School: Total Enrollment

	2019- 20	2020- 21	2021- 22	2022- 23	2023- 24	2024- 25	2025- 26	2026- 27	2027- 28	2028- 29	2029- 30	2030- 31	2031- 32	2032- 33
9	370	413	419	431	433	462	510	473	569	524	530	554	522	510
10	415	364	421	421	429	431	460	507	471	566	521	527	548	517
11	381	405	361	420	419	427	429	458	504	469	563	518	522	543
12	321	367	391	343	405	404	412	414	442	486	453	543	513	517
Total 9-12	1487	1549	1592	1615	1686	1724	1811	1852	1986	2045	2067	2142	2105	2087
Total 9-12	1487	1549	1592	1615	1686	1724	1811	1852	1986	2045	2067	2142	2105	2087
Change		62	43	23	71	38	87	41	134	59	22	75	-37	-18
%-Change		4.2%	2.8%	1.4%	4.4%	2.3%	5.0%	2.3%	7.2%	3.0%	1.1%	3.6%	-1.7%	-0.9%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

School District Five of Lexington and Richland Counties Demographic Study – June 2023

Chapin Cluster: Total Enrollment

	2019- 20	2020- 21	2021- 22	2022- 23	2023- 24	2024- 25	2025- 26	2026- 27	2027- 28	2028- 29	2029- 30	2030- 31	2031- 32	2032- 33
PK	85	77	88	99	99	99	99	99	99	99	99	99	99	99
K	309	287	346	357	362	367	366	363	369	374	378	380	384	393
1	343	325	364	396	386	393	400	395	390	393	395	396	396	397
2	313	349	379	399	425	412	417	423	412	404	405	404	405	405
3	379	324	405	407	419	446	432	436	438	425	416	414	413	414
4	359	403	373	459	430	443	472	457	456	458	444	433	429	428
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total PK-5	1788	1765	1955	2117	2121	2160	2186	2173	2164	2153	2137	2126	2126	2136
5	377	401	440	415	509	473	483	510	489	483	481	466	455	450
6	428	410	466	502	469	570	525	531	556	528	517	515	499	487
Total: 5-6	805	811	906	917	978	1043	1008	1041	1045	1011	998	981	954	937
7	513	452	460	495	547	511	616	567	573	600	570	558	551	534
8	494	521	483	492	525	580	537	647	595	602	630	593	580	576
Total: 7-8	1007	973	943	987	1072	1091	1153	1214	1168	1202	1200	1151	1131	1110
9	370	413	419	431	433	462	510	473	569	524	530	554	522	510
10	415	364	421	421	429	431	460	507	471	566	521	527	548	517
11	381	405	361	420	419	427	429	458	504	469	563	518	522	543
12	321	367	391	343	405	404	412	414	442	486	453	543	513	517
Total: 9-12	1487	1549	1592	1615	1686	1724	1811	1852	1986	2045	2067	2142	2105	2087
Total PK-12	5087	5098	5396	5636	5857	6018	6158	6280	6363	6411	6402	6400	6316	6270
Total PK-12	5087	5098	5396	5636	5857	6018	6158	6280	6363	6411	6402	6400	6316	6270
Change		11	298	240	221	161	140	122	83	48	-9	-2	-84	-46
%-Change		0.2%	5.8%	4.4%	3.9%	2.7%	2.3%	2.0%	1.3%	0.8%	-0.1%	0.0%	-1.3%	-0.7%
Total: PK-5	1788	1765	1955	2117	2121	2160	2186	2173	2164	2153	2137	2126	2126	2136
Change		-23	190	162	4	39	26	-13	-9	-11	-16	-11	0	10
%-Change		-1.3%	10.8%	8.3%	0.2%	1.8%	1.2%	-0.6%	-0.4%	-0.5%	-0.7%	-0.5%	0.0%	0.5%
Total: 5-6	805	811	906	917	978	1043	1008	1041	1045	1011	998	981	954	937
Change		6	95	11	61	65	-35	33	4	-34	-13	-17	-27	-17
%-Change		0.7%	11.7%	1.2%	6.7%	6.6%	-3.4%	3.3%	0.4%	-3.3%	-1.3%	-1.7%	-2.8%	-1.8%
Total: 7-8	1007	973	943	987	1072	1091	1153	1214	1168	1202	1200	1151	1131	1110
Change		-34	-30	44	85	19	62	61	-46	34	-2	-49	-20	-21
%-Change		-3.4%	-3.1%	4.7%	8.6%	1.8%	5.7%	5.3%	-3.8%	2.9%	-0.2%	-4.1%	-1.7%	-1.9%
Total: 9-12	1487	1549	1592	1615	1686	1724	1811	1852	1986	2045	2067	2142	2105	2087
Change		62	43	23	71	38	87	41	134	59	22	75	-37	-18
%-Change		4.2%	2.8%	1.4%	4.4%	2.3%	5.0%	2.3%	7.2%	3.0%	1.1%	3.6%	-1.7%	-0.9%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Dutch Fork Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	41	18	39	36	36	36	36	36	36	36	36	36	36	36
K	57	75	70	60	62	63	62	60	61	62	63	65	66	68
1	87	64	81	77	66	67	69	67	65	66	67	68	69	70
2	78	69	65	84	78	67	66	68	66	64	65	66	67	68
3	84	60	70	68	86	80	69	68	70	68	66	67	68	69
4	90	84	67	72	69	87	81	70	69	71	69	67	68	69
5	92	87	86	79	73	70	89	83	71	70	72	70	68	69
Total PK-5	529	457	478	476	470	470	472	452	438	437	438	439	442	449
Total PK-5	529	457	478	476	470	470	472	452	438	437	438	439	442	449
Change		-72	21	-2	-6	0	2	-20	-14	-1	1	1	3	7
%-Change		-14%	4.6%	-0.4%	-1.3%	0.0%	0.4%	-4.2%	-3.1%	-0.2%	0.2%	0.2%	0.7%	1.6%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

HE Corley Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	120	94	110	104	104	104	104	104	104	104	104	104	104	104
K	94	87	75	76	76	78	76	75	77	78	80	81	82	84
1	85	84	90	78	80	81	82	80	79	81	82	83	84	85
2	61	75	81	76	76	78	79	80	79	78	80	81	82	83
3	93	48	83	86	78	78	80	81	82	81	80	82	83	84
4	69	95	59	80	88	80	80	82	82	83	82	81	83	84
5	108	65	86	58	81	89	81	81	84	84	85	84	83	85
Total PK-5	630	548	584	558	583	588	582	583	587	589	593	596	601	609
Total PK-5	630	548	584	558	583	588	582	583	587	589	593	596	601	609
Change		-82	36	-26	25	5	-6	1	4	2	4	3	5	8
%-Change		-13%	6.6%	-4.5%	4.5%	0.9%	-1.0%	0.2%	0.7%	0.3%	0.7%	0.5%	0.8%	1.3%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Ballentine Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	4	1	3	6	6	6	6	6	6	6	6	6	6	6
K	111	102	67	72	71	74	73	72	73	73	76	77	78	79
1	101	102	100	63	74	76	79	78	77	78	79	81	82	83
2	118	109	100	109	66	78	80	83	81	80	81	83	85	84
3	125	110	94	106	113	69	81	83	85	83	82	83	85	87
4	116	114	93	91	109	116	71	83	85	87	85	84	84	86
5	104	98	105	80	63	81	88	44	56	58	60	62	61	61
Total PK-5	679	636	562	527	502	500	478	449	463	465	469	476	481	486
Total PK-5	679	636	562	527	502	500	478	449	463	465	469	476	481	486
Change		-43	-74	-35	-25	-2	-22	-29	14	2	4	7	5	5
%-Change		-6.3%	-12%	-6.2%	-4.7%	-0.4%	-4.4%	-6.1%	3.1%	0.4%	0.9%	1.5%	1.1%	1.0%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

River Springs Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	41	16	20	21	21	21	21	21	21	21	21	21	21	21
K	67	60	58	64	66	68	67	66	67	69	70	72	73	74
1	78	65	61	59	68	69	71	70	69	70	72	73	74	75
2	85	78	70	64	61	70	71	73	71	70	71	74	75	76
3	79	83	82	78	66	63	72	73	74	72	71	72	75	77
4	85	76	89	82	80	68	65	74	74	75	73	73	75	79
5	83	77	73	103	84	82	69	66	75	75	77	76	77	79
Total PK-5	518	455	453	471	446	441	436	443	451	452	455	461	470	481
Total PK-5	518	455	453	471	446	441	436	443	451	452	455	461	470	481
Change		-63	-2	18	-25	-5	-5	7	8	1	3	6	9	11
%-Change		-12%	-0.4%	4.0%	-5.3%	-1.1%	-1.1%	1.6%	1.8%	0.2%	0.7%	1.3%	2.0%	2.3%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Oak Pointe Elementary: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	21	15	21	20	20	20	20	20	20	20	20	20	20	20
K	89	85	64	74	71	74	72	72	73	75	76	78	79	80
1	72	83	93	69	78	79	80	78	77	78	79	80	81	82
2	99	71	79	98	70	80	81	82	80	79	80	82	83	84
3	89	100	71	82	101	72	82	84	85	83	82	84	86	87
4	104	81	108	75	85	105	75	86	88	89	87	87	89	91
5	106	99	90	102	77	87	107	77	88	90	91	89	89	91
Total PK-5	580	534	526	520	502	517	517	499	511	514	515	520	527	535
Total PK-5	580	534	526	520	502	517	517	499	511	514	515	520	527	535
Change		-46	-8	-6	-18	15	0	-18	12	3	1	5	7	8
%-Change		-7.9%	-1.5%	-1.1%	-3.5%	3.0%	0.0%	-3.5%	2.4%	0.6%	0.2%	1.0%	1.3%	1.5%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Dutch Fork Middle School: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
6	5	4	4	4	4	4	4	4	4	4	4	4	4	4
7	511	451	457	449	461	459	414	449	453	393	405	411	419	413
8	495	514	467	468	458	470	468	422	458	462	401	413	419	427
Total 6-8	1011	969	928	921	923	933	886	875	915	859	810	828	842	844
Total 6-8	1011	969	928	921	923	933	886	875	915	859	810	828	842	844
Change		-42	-41	-7	2	10	-47	-11	40	-56	-49	18	14	2
%-Change		-4.2%	-4.2%	-0.8%	0.2%	1.1%	-5.0%	-1.2%	4.6%	-6.1%	-5.7%	2.2%	1.7%	0.2%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Dutch Fork High School: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
9	466	420	492	504	477	467	479	477	430	467	471	409	421	427
10	448	434	431	478	479	453	444	455	453	409	444	447	389	400
11	382	430	403	369	435	436	412	404	414	412	372	404	407	354
12	396	365	383	375	343	405	405	383	376	385	383	346	376	379
Total 9-12	1692	1649	1709	1726	1734	1761	1740	1719	1673	1673	1670	1606	1593	1560
Total 9-12	1692	1649	1709	1726	1734	1761	1740	1719	1673	1673	1670	1606	1593	1560
Change		-43	60	17	8	27	-21	-21	-46	0	-3	-64	-13	-33
%-Change		-2.5%	3.6%	1.0%	0.5%	1.6%	-1.2%	-1.2%	-2.7%	0.0%	-0.2%	-3.8%	-0.8%	-2.1%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Dutch Fork Cluster: Total Enrollment

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
PK	227	144	193	187	187	187	187	187	187	187	187	187	187	187
K	418	409	334	346	346	357	350	345	351	357	365	373	378	385
1	423	398	425	346	366	372	381	373	367	373	379	385	390	395
2	441	402	395	431	351	373	377	386	377	371	377	386	392	395
3	470	401	400	420	444	362	384	389	396	387	381	388	397	404
4	464	450	416	400	431	456	372	395	398	405	396	392	399	409
5	493	426	440	422	378	409	434	351	374	377	385	381	378	385
Total PK-5	2936	2630	2603	2552	2503	2516	2485	2426	2450	2457	2470	2492	2521	2560
6	5	4	4	4	4	4	4	4	4	4	4	4	4	4
7	511	451	457	449	461	459	414	449	453	393	405	411	419	413
8	495	514	467	468	458	470	468	422	458	462	401	413	419	427
Total: 6-8	1011	969	928	921	923	933	886	875	915	859	810	828	842	844
9	466	420	492	504	477	467	479	477	430	467	471	409	421	427
10	448	434	431	478	479	453	444	455	453	409	444	447	389	400
11	382	430	403	369	435	436	412	404	414	412	372	404	407	354
12	396	365	383	375	343	405	405	383	376	385	383	346	376	379
Total: 9-12	1692	1649	1709	1726	1734	1761	1740	1719	1673	1673	1670	1606	1593	1560
Total PK-12	5639	5248	5240	5199	5160	5210	5111	5020	5038	4989	4950	4926	4956	4964
Total PK-12	5639	5248	5240	5199	5160	5210	5111	5020	5038	4989	4950	4926	4956	4964
Change		-391	-8	-41	-39	50	-99	-91	18	-49	-39	-24	30	8
%-Change		-6.9%	-0.2%	-0.8%	-0.8%	1.0%	-1.9%	-1.8%	0.4%	-1.0%	-0.8%	-0.5%	0.6%	0.2%
Total: PK-5	2936	2630	2603	2552	2503	2516	2485	2426	2450	2457	2470	2492	2521	2560
Change		-306	-27	-51	-49	13	-31	-59	24	7	13	22	29	39
%-Change		-10%	-1.0%	-2.0%	-1.9%	0.5%	-1.2%	-2.4%	1.0%	0.3%	0.5%	0.9%	1.2%	1.5%
Total: 6-8	1011	969	928	921	923	933	886	875	915	859	810	828	842	844
Change		-42	-41	-7	2	10	-47	-11	40	-56	-49	18	14	2
%-Change		-4.2%	-4.2%	-0.8%	0.2%	1.1%	-5.0%	-1.2%	4.6%	-6.1%	-5.7%	2.2%	1.7%	0.2%
Total: 9-12	1692	1649	1709	1726	1734	1761	1740	1719	1673	1673	1670	1606	1593	1560
Change		-43	60	17	8	27	-21	-21	-46	0	-3	-64	-13	-33
%-Change		-2.5%	3.6%	1.0%	0.5%	1.6%	-1.2%	-1.2%	-2.7%	0.0%	-0.2%	-3.8%	-0.8%	-2.1%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Spring Hill High School: Total Enrollment

	2019- 20	2020- 21	2021- 22	2022- 23	2023- 24	2024- 25	2025- 26	2026- 27	2027- 28	2028- 29	2029- 30	2030- 31	2031- 32	2032- 33
9	301	304	302	282	305	314	327	318	323	326	330	317	315	313
10	280	298	293	290	271	293	301	314	305	310	313	317	304	302
11	272	264	273	260	270	252	272	280	292	284	288	291	295	283
12	269	270	250	257	244	254	237	256	263	274	267	271	274	277
Total 9-12	1122	1136	1118	1089	1090	1113	1137	1168	1183	1194	1198	1196	1188	1175
Total 9-12	1122	1136	1118	1089	1090	1113	1137	1168	1183	1194	1198	1196	1188	1175
Change		14	-18	-29	1	23	24	31	15	11	4	-2	-8	-13
%-Change		1.2%	-1.6%	-2.6%	0.1%	2.1%	2.2%	2.7%	1.3%	0.9%	0.3%	-0.2%	-0.7%	-1.1%

Blue cells are historical data; Red numbers are current enrollment; Orange cells are forecasted enrollment.

Appendix D: Live versus Attend Matrices

		Where K-4th Students Live																Live Out, Attend In (K-4)
		<div>Ballentine Elementary Chapin Elementary Dutch Fork Elementary H. E. Corley Elementary Harbison West Elementary Irmo Elementary Lake Murray Elementary Leaphart Elementary Nursery Road Elementary Oak Pointe Elementary Piney Woods Elementary River Springs Elementary Seven Oaks Elementary Out of District Unmatched</div>																
		476	767	391	388	367	331	869	387	332	322	409	314	432	95	2	1060	
Where K-4th Students Attend	Ballentine	441	400	4	1	5	1	4	16	2	1		1		3	3		41
	Chapin	708	4	659	2			2	16			1	6			18		49
	Dutch Fork	361	10		301	10	7	4	3	8		6		5	5	2		60
	H. E. Corley	396	13	2	12	315	4	6	8	4	4	6		7	7	8		81
	Harbison West	367	5	7	9	8	274	10	9	10	7	3	4	6	8	7		93
	Irmo	425	4	2	9	16	24	260	1	26	58	5		1	8	11		165
	Lake Murray	809	6	23					765			2	4	2		7		44
	Leaphart	388	3	2	11	3	18	4	2	302	8	3	1		24	7		86
	Nursery Road	339	3	1	2	3	17	26	2	18	245	2			19	1		94
	Oak Pointe	398	15	2	26	19	5	3	6	2	3	285	1	19	4	8		113
	Piney Woods	501	4	60				2	31		1	2	391	2		7	1	109
	River Springs	347	8	5	15	9	2	5	10	3		7	1	271	2	8	1	75
	Seven Oaks	402	1		3		15	5		12	5			1	352	8		50
Live In, Attend Out (K-4)	965	76	108	90	73	93	71	104	85	87	37	18	43	80				

School District Five of Lexington and Richland Counties Demographic Study – June 2023

		Where 5th Students Live														
		Ballentine Elementary	Chapin Intermediate	Ballentine / Chapin	Dutch Fork Elementary	H. E. Corley Elementary	Harbison West Elementary	Irmo Elementary	Leaphart Elementary	Nursery Road Elementary	Oak Pointe Elementary	River Springs Elementary	Seven Oaks Elementary	Out of District	Unmatched	Live Out, Attend In (5)
Where 5th Students Attend	Ballentine	80	69	4	6				1							11
	Chapin	415	2	390	14			2		1	1		5			25
	Dutch Fork	79	4	2		58	3	1		2	5	3		1		79
	H E Corley	58	1			2	52				1	2				56
	Harbison West	94	4	3	1	3	2	65	5	4	2	1	1			92
	Irmo	96				1	3	10	65	4	9		3	1		86
	Leaphart	84				3		7	1	64	1	1		5	2	83
	Nursery Road	73	1			1	1	3	6	1	53	1	2	2	2	72
	Oak Pointe	102	6	5		6	3	1	2	1	2	69	5		2	100
	River Springs	103		9		5	2	1		4	1	2	77	2		101
	Seven Oaks	78				1		5		1	1		67	3		78
	Live In, Attend Out (5)	196	18	23	1	22	14	28	17	17	17	11	15	13		

		Where 6th Students Live				
Where 6th Students Attend		Chapin Intermediate	Cross Roads Intermediate	Out of District	Unmatched	Live Out, Attend In (6)
		499	828	11	1	167
	Chapin Int	498	483	11	4	15
	CrossRoads	698	5	688	5	10
	Chapin	4	4			4
	Dutch Fork	4		4		4
	Irmo	135	7	125	2	1
	Live In, Attend Out (6)	156	16	140		

		Where 7-8th Students Live						
		<div>Chapin Middle</div> <div>Dutch Fork Middle</div> <div>Irmo Middle</div> <div>Out of District</div> <div>Unmatched</div> <div>Live Out, Attend In (7-8)</div>						
Where 7-8th Students		974	950	828	27	1	119	
	Chapin	987	963	6	5	13	24	
	Dutch Fork	917	6	888	14	8	1	28
	Irmo	876	5	56	809	6	67	
	Live In, Attend Out (7-8)	92	11	62	19			

		Where 9-12th Students Live					
		Chapin High School	Dutch Fork High School	Irmo High School	Out of District	Unmatched	Live Out, Attend In (7-8)
Where 9-12th Students Attend		1627	1714	1260	47	0	306
	Chapin	1615	1552	30	14	19	63
	Dutch Fork	1726	57	1600	56	13	126
	Irmo	1307	18	84	1190	15	117
	Spring Hill		429	374	279	7	
	Live In, Attend Out (7-8)	259	75	114	70		