



**AGENDA
BOARD OF TRUSTEES
REGULAR MEETING
H. E. CORLEY ELEMENTARY SCHOOL'S
FEBRUARY 22, 2016**

1. Call to order at 6:00 p.m.
2. Enter executive session to consider the following:
 - a. Selected employment items (Exhibit A)
3. Call to order at 7:00 p.m.
4. Welcoming remarks
5. Invocation – Robert Gantt, Chairman, Board of Trustees
6. Pledge of Allegiance – Rachael McCrary, a fifth grade student at H. E. Corley Elementary School
7. School Board Spotlight
8. Approval of the Agenda
9. Approval of the minutes of the February 8, 2016 board meeting
10. Welcome and brief overview of H. E. Corley Elementary School by Judy Franchini, Principal
11. Superintendent's Report
 - a. Office of Finance and Operations
 1. Monthly Financial Reports (Exhibit B)
12. Public participation*

ACTION AGENDA

13. Items considered in executive session
14. Second reading approval of the FY 2017 Capital Budget Proposal (Exhibit C)
15. Approval of resolution for capital budget (Exhibit D)
16. Approval of proposed Board Meeting Schedule for 2016-2017 (Exhibit E)
17. Approval of Textbook Adoptions FY 2015-2016 recommendations (Exhibit F)

DISCUSSION AGENDA

18. Textbook Adoptions FY 2016-2017 recommendations (Exhibit G)
19. Proposed revisions to Board policy GDJ "Support Staff Assignments and Transfers"; GDJ-R "Support Staff Assignments and Transfers" (Exhibit H)
20. Proposed revisions to Board policy GDQD "Discipline, Suspension and Dismissal of Support Staff" (Exhibit I)
21. Proposed revisions to Board policy GCK "Professional Staff Assignments and Transfers"; GCK-R "Professional Staff Assignments and Transfers" (Exhibit J)
22. Delete Board policy CFC "Assignment and Transfer of Building Administrators." (Exhibit K)
23. Adjourn

FOR YOUR INFORMATION

24. The next regular school board meeting will be March 14 at Chapin Intermediate School.

*The Board welcomes and encourages public participation. We respectfully ask that you adhere to the procedures and the decorum provided in board policy BEDH "Public Participation at Meetings". Your comments should be limited to three minutes. Questions asked during public participation and placed in writing will receive a written response in a timely manner.



Minutes/February 8, 2016

The Board of Trustees of School District Five of Lexington and Richland Counties met at Nursery Road Elementary School with the following members present:

Mr. Robert Gantt, Chairman
Mrs. Ellen Baumgardner, Vice Chairman
Mrs. Jondy Loveless, Secretary
Mr. Larry Haltiwanger
Mrs. Jan Hammond
Ms. Beth Hutchison
Mr. Ed White
Dr. Stephen Hefner, District Superintendent

The following staff were in attendance:

Mr. Mark Bounds, Chief Information Officer
Mr. Michael Harris, Chief Student Services Officer
Dr. Christina Melton, Chief Instructional Officer
Mr. Len Richardson, Chief Finance Officer

Chairman Gantt called the meeting to order and gave welcoming remarks.

The Invocation was given by Larry Haltiwanger. The Pledge of Allegiance was led by Precious Bross, a fourth grade student at Nursery Road Elementary School.

The Board conducted the School Board Spotlight.

A welcome and brief overview of Nursery Road Elementary School was given by Love Ligons, Principal.

Dr. Hefner presented the Superintendent's Report.

During the public participation, Cindy Gleaton spoke regarding the Chapin High School's Drama Theater; Bill Murphy spoke regarding booster clubs.

Mark Bounds presented the proposed Board Meeting schedule for 2016-2017 (Exhibit C).

Christina Melton presented Textbook Adoptions FY 2015-2016 (Exhibit D).

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

SCHOOL DISTRICT FIVE
OF
LEXINGTON AND RICHLAND COUNTIES

Meeting of February 8, 2016

	B A U M G A R D N E R	G A N T T	H A L T I W A N G E R	H A M M O N D	H U T C H I S O N	L O V E L E S S	W H I T E
1. M. Baumgardner S. Haltiwanger Enter executive session to consider the following: a) selected employment items (Exhibit A); b) student enrollment matter; and c) legal briefing on contractual matters regarding construction	X	X	X	A	A	X	A
2. M. Baumgardner S. Hammond Approve the revised agenda	X	X	X	X	X	X	X
3. M. Hammond S. Hutchison Approve the minutes of the January 19, 2016 board meeting	X	X	X	X	X	X	X
4. M. Baumgardner S. Hutchison Approve the selected employment items (Exhibit A)	X	X	X	X	X	X	X
5. M. Hutchison S. Loveless Uphold board policy IKG "Secondary Education" regarding the student enrollment matter as shown in item 2b	X	X	X	X	X	X	X
6. M. Hammond S. Haltiwanger Approve first reading of the FY 2017 Capital Budget (Exhibit B) M. Hutchison S. Hammond Amend to remove item 038 (Chapin High Upgrade Drama Theater) from the approval of the capital projects as presented Vote on original motion							
	X	X	X	X	X	X	X
	X	X	X	X	X	X	X
7. M. Baumgardner S. White Table item 17 (Exhibit E), 18 (Exhibit F), 19 (Exhibit G),	X	X	X	X	X	X	X

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SCHOOL DISTRICT FIVE
OF
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Meeting of February 8, 2016

	B A U M G A R D N E R	G A N T T	H A L T I W A N G E R	H A M M O N D	H U T C H I S S O N	L O V E L E S S	W H I T E
and 20 (Exhibit H) until the next scheduled meeting on February 22, 2016							
8. M. Baumgardner S. Hammond Adjourn at 9:20 p.m.	X	X	X	X	X	X	X


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MEMORANDUM

To: Members of the Board of Trustees

Through: Stephen Hefner, Ed.D.
Superintendent

From: A. Len Richardson 
Chief Finance Officer

Date: February 17, 2016

Re: Monthly Financial Reports – January 2016

Attached for your information are the revenue and expenditure reports for January 2016.

Due to the timing of the January 2016 Board Meeting, the December 2015 local revenue was not included in the monthly financial reports. The revenue report included in this packet incorporates December 2015 and January 2016.

ALR:tl

Attachment

School District Five of Lexington and Richland

Board Report Revenue

From Date: 12/1/2015

To Date: 1/31/2016

Fiscal Year: 2015-2016

☐ Subtotal by Collapse Mask

☐ Include pre encumbrance

☒ Print accounts with zero balance

☒ Filter Encumbrance Detail by Date Range

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.000.0111001.0000.000	Ad Valorem Taxes - Lexington	(\$32,914,714.00)	(\$30,359,589.70)	(\$33,004,059.88)	\$89,345.88	\$0.00	\$89,345.88	-0.27%
100.000.0111002.0000.000	Ad Valorem Taxes - Richland	(\$14,787,770.00)	(\$3,714,474.45)	(\$4,377,005.58)	(\$10,410,764.42)	\$0.00	(\$10,410,764.42)	70.40%
100.000.0112001.0000.000	Vehicle Taxes - Lexington	(\$6,179,948.00)	(\$1,044,633.90)	(\$3,883,992.07)	(\$2,295,955.93)	\$0.00	(\$2,295,955.93)	37.15%
100.000.0112002.0000.000	Vehicle Taxes - Richland	(\$5,704,567.00)	\$0.00	\$0.00	(\$5,704,567.00)	\$0.00	(\$5,704,567.00)	100.00%
100.000.0113001.0000.000	Delinquent Taxes - Lexington	(\$1,012,664.00)	(\$184,025.52)	(\$602,438.87)	(\$410,225.13)	\$0.00	(\$410,225.13)	40.51%
100.000.0113002.0000.000	Delinquent Taxes - Richland	(\$795,665.00)	(\$59,548.94)	(\$326,128.74)	(\$469,536.26)	\$0.00	(\$469,536.26)	59.01%
100.000.0114001.0000.000	Penalties & Interest on Taxes	(\$116,000.00)	(\$33,266.32)	(\$97,527.51)	(\$18,472.49)	\$0.00	(\$18,472.49)	15.92%
100.000.0114002.0000.000	Penalties & Interest on Taxes	(\$84,000.00)	(\$11,345.54)	(\$65,129.07)	(\$18,870.93)	\$0.00	(\$18,870.93)	22.47%
100.000.0128001.0000.000	Revenue in Lieu of Taxes - Lex	(\$999,300.00)	(\$143,127.69)	(\$143,127.69)	(\$856,172.31)	\$0.00	(\$856,172.31)	85.68%
100.000.0128002.0000.000	Revenue in Lieu of Taxes - Ric	\$0.00	(\$4,285.30)	(\$31,956.51)	\$31,956.51	\$0.00	\$31,956.51	0.00%
100.000.0131000.0000.000	Student Tuition Out of Distric	(\$10,000.00)	\$0.00	(\$135.00)	(\$9,865.00)	\$0.00	(\$9,865.00)	98.65%
100.000.0131000.0000.006	Student Tuition Out of Distric	\$0.00	(\$1,865.34)	(\$1,865.34)	\$1,865.34	\$0.00	\$1,865.34	0.00%
100.000.0132000.0000.006	Tuition from Other LEAs for Re	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
100.000.0151000.0000.000	Interest on Investments	(\$60,000.00)	\$0.00	(\$24,754.37)	(\$35,245.63)	\$0.00	(\$35,245.63)	58.74%
100.000.0174000.0000.000	Student Fees	(\$21,000.00)	(\$13,353.58)	(\$13,353.58)	(\$7,646.42)	\$0.00	(\$7,646.42)	36.41%
100.000.0190000.0000.000	Other Revenues from Local Sour	\$0.00	\$0.00	(\$2,900.00)	\$2,900.00	\$0.00	\$2,900.00	0.00%
100.000.0191000.0000.000	Rentals	(\$70,000.00)	(\$28,215.00)	(\$97,045.00)	\$27,045.00	\$0.00	\$27,045.00	-38.64%
100.000.0193000.0000.000	Medicaid	(\$100,000.00)	\$0.00	\$0.00	(\$100,000.00)	\$0.00	(\$100,000.00)	100.00%
100.000.0195000.0000.000	Refund of Prior Year	(\$8,000.00)	(\$1,457.51)	(\$23,200.70)	\$15,200.70	\$0.00	\$15,200.70	-190.01%
100.000.0199200.0000.000	E-Rate Revenue	\$0.00	\$7,751.60	(\$205,418.41)	\$205,418.41	\$0.00	\$205,418.41	0.00%
100.000.0199300.0000.000	Insurance Proceeds	(\$10,000.00)	\$0.00	\$0.00	(\$10,000.00)	\$0.00	(\$10,000.00)	100.00%
100.000.0199900.0000.000	Other Local Revenue	(\$430,000.00)	\$230,150.49	(\$35,986.61)	(\$394,013.39)	\$0.00	(\$394,013.39)	91.63%
100.000.0199901.0000.000	Other Local Revenue - Lexingto	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
100.000.0199902.0000.000	Other Local Revenue - Richland	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
100.000.0316000.0000.000	School Bus Driver Salary	(\$650,000.00)	(\$112,194.07)	(\$308,533.69)	(\$341,466.31)	\$0.00	(\$341,466.31)	52.53%
100.000.0316200.0000.000	Workers Compensation School Bu	(\$58,632.00)	\$0.00	(\$59,218.07)	\$586.07	\$0.00	\$586.07	-1.00%
100.000.0318000.0000.000	State Fringe Benefits	(\$14,882,726.00)	(\$2,579,074.00)	(\$9,065,087.75)	(\$5,817,638.25)	\$0.00	(\$5,817,638.25)	39.09%
100.000.0318100.0000.000	Retiree Health Insurance	(\$4,544,877.00)	(\$626,839.83)	(\$2,223,480.43)	(\$2,321,396.57)	\$0.00	(\$2,321,396.57)	51.08%
100.000.0331000.0000.000	EFA Full Time Programs	(\$35,927,552.00)	\$0.00	\$0.00	(\$35,927,552.00)	\$0.00	(\$35,927,552.00)	100.00%
100.000.0331100.0000.000	EFA - Kindergarten	\$0.00	(\$253,813.30)	(\$898,342.14)	\$898,342.14	\$0.00	\$898,342.14	0.00%
100.000.0331200.0000.000	EFA - Primary	\$0.00	(\$796,023.49)	(\$2,857,590.73)	\$2,857,590.73	\$0.00	\$2,857,590.73	0.00%
100.000.0331300.0000.000	EFA - Elementary	\$0.00	(\$1,520,954.38)	(\$5,428,038.13)	\$5,428,038.13	\$0.00	\$5,428,038.13	0.00%
100.000.0331400.0000.000	EFA - High School	\$0.00	(\$336,886.88)	(\$1,132,309.47)	\$1,132,309.47	\$0.00	\$1,132,309.47	0.00%
100.000.0331500.0000.000	EFA - Trainable Mentally Handi	\$0.00	(\$14,375.84)	(\$53,113.19)	\$53,113.19	\$0.00	\$53,113.19	0.00%
100.000.0331600.0000.000	EFA - Speech Handicapped	\$0.00	(\$454,798.91)	(\$1,670,917.86)	\$1,670,917.86	\$0.00	\$1,670,917.86	0.00%
100.000.0331700.0000.000	EFA - Homebound	\$0.00	(\$4,106.36)	(\$24,638.17)	\$24,638.17	\$0.00	\$24,638.17	0.00%
100.000.0332100.0000.000	EFA - Emotionally Handicapped	\$0.00	(\$28,177.63)	(\$106,434.58)	\$106,434.58	\$0.00	\$106,434.58	0.00%
100.000.0332200.0000.000	EFA - Educable Mentally Handic	\$0.00	(\$10,601.49)	(\$29,609.89)	\$29,609.89	\$0.00	\$29,609.89	0.00%
100.000.0332300.0000.000	EFA - Learning Disabilities	\$0.00	(\$385,258.85)	(\$1,316,169.45)	\$1,316,169.45	\$0.00	\$1,316,169.45	0.00%
100.000.0332400.0000.000	EFA - Hearing Handicapped	\$0.00	(\$11,658.42)	(\$45,887.27)	\$45,887.27	\$0.00	\$45,887.27	0.00%
100.000.0332500.0000.000	EFA - Visually Handicapped	\$0.00	(\$11,921.31)	(\$44,352.26)	\$44,352.26	\$0.00	\$44,352.26	0.00%
100.000.0332600.0000.000	EFA - Orthopedically Handicapp	\$0.00	(\$7,623.84)	(\$26,721.44)	\$26,721.44	\$0.00	\$26,721.44	0.00%
100.000.0332700.0000.000	EFA - Vocational	\$0.00	(\$1,257,491.25)	(\$4,436,525.90)	\$4,436,525.90	\$0.00	\$4,436,525.90	0.00%
100.000.0333100.0000.000	EFA - Autism	\$0.00	(\$138,186.83)	(\$456,464.28)	\$456,464.28	\$0.00	\$456,464.28	0.00%
100.000.0333200.0000.000	EFA - Gifted and Talented Educ	\$0.00	(\$195,719.74)	(\$713,784.39)	\$713,784.39	\$0.00	\$713,784.39	0.00%
100.000.0333400.0000.000	EFA - Limited English Proficie	\$0.00	(\$21,514.15)	(\$82,588.06)	\$82,588.06	\$0.00	\$82,588.06	0.00%
100.000.0335100.0000.000	EFA - Academic Assistance	\$0.00	(\$132,505.16)	(\$349,900.86)	\$349,900.86	\$0.00	\$349,900.86	0.00%
100.000.0335200.0000.000	EFA - Pupils in Poverty	\$0.00	(\$408,125.01)	(\$1,437,323.46)	\$1,437,323.46	\$0.00	\$1,437,323.46	0.00%
100.000.0381001.0000.000	Local Property Tax Relief (Tie	(\$6,611,007.00)	(\$5,949,906.73)	(\$5,949,906.73)	(\$661,100.27)	\$0.00	(\$661,100.27)	10.00%
100.000.0381002.0000.000	Local Property Tax Relief (Tie	(\$3,969,064.00)	(\$3,572,157.21)	(\$3,572,157.21)	(\$396,906.79)	\$0.00	(\$396,906.79)	10.00%
100.000.0382001.0000.000	Homestead Exemption (Tier 2) -	(\$1,197,542.00)	\$0.00	\$0.00	(\$1,197,542.00)	\$0.00	(\$1,197,542.00)	100.00%
100.000.0382002.0000.000	Homestead Exemption (Tier 2) -	(\$560,658.00)	\$0.00	\$0.00	(\$560,658.00)	\$0.00	(\$560,658.00)	100.00%

School District Five of Lexington and Richland

Board Report Revenue

From Date: 12/1/2015

To Date: 1/31/2016

Fiscal Year: 2015-2016

☐ Subtotal by Collapse Mask

☐ Include pre encumbrance

☒ Print accounts with zero balance

☒ Filter Encumbrance Detail by Date Range

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.000.0382500.0000.000	Property Tax Relief - Tier 3	(\$29,939,069.00)	(\$5,987,813.80)	(\$11,975,627.60)	(\$17,963,441.40)	\$0.00	(\$17,963,441.40)	60.00%
100.000.0383001.0000.000	Merchants Inventory Tax - Lexi	(\$192,912.00)	(\$49,220.20)	(\$147,660.60)	(\$45,251.40)	\$0.00	(\$45,251.40)	23.46%
100.000.0383002.0000.000	Merchants Inventory Tax - Rich	(\$16,775.00)	\$0.00	(\$8,537.16)	(\$8,237.84)	\$0.00	(\$8,237.84)	49.11%
100.000.0384001.0000.000	Manufacturers Depr. Reimburse	(\$300,626.00)	\$0.00	\$0.00	(\$300,626.00)	\$0.00	(\$300,626.00)	100.00%
100.000.0384002.0000.000	Manufacturers Depr. Reimburse	(\$3,037.00)	\$0.00	\$0.00	(\$3,037.00)	\$0.00	(\$3,037.00)	100.00%
100.000.0389001.0000.000	Motor Carrier Vehicle Tax - L	(\$98,149.00)	(\$20,805.12)	(\$113,644.65)	\$15,495.65	\$0.00	\$15,495.65	-15.79%
100.000.0389002.0000.000	Motor Carrier Vehicle Tax - Ri	(\$41,851.00)	(\$548,258.92)	(\$3,126,696.37)	\$3,084,845.37	\$0.00	\$3,084,845.37	-7371.02%
100.000.0390000.0000.000	Other State Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
100.000.0399000.0000.000	Revenue from Other State Sourc	(\$245,000.00)	\$0.00	\$0.00	(\$245,000.00)	\$0.00	(\$245,000.00)	100.00%
100.000.0399900.0000.000	Revenue from Other State Agenc	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
100.000.0500000.0000.000	Other Sources	\$0.00	(\$416.50)	(\$605.50)	\$605.50	\$0.00	\$605.50	0.00%
100.000.0520000.0000.000	Interfund Transfers	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
100.000.0522000.0000.000	Transfer from Special Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
100.000.0523000.0000.000	Transfer from EIA	(\$3,642,916.00)	(\$1,561,550.45)	(\$1,561,550.45)	(\$2,081,365.55)	\$0.00	(\$2,081,365.55)	57.13%
100.000.0525000.0000.000	Transfer from Building Fund	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
100.000.0527000.0000.000	Transfer from Pupil Activity	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
100.000.0527000.0000.009	Transfer from Pupil Activity	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
100.000.0528000.0000.000	Transfer of Indirect Cost	(\$265,000.00)	(\$5,451.72)	(\$40,878.05)	(\$224,121.95)	\$0.00	(\$224,121.95)	84.57%
100.000.0530000.0000.000	Sale of Fixed Assets	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%
FUND: General Fund - 100		(\$166,451,021.00)	(\$62,364,718.09)	(\$102,200,320.72)	(\$64,250,700.28)	\$0.00	(\$64,250,700.28)	38.60%
Grand Total:		(\$166,451,021.00)	(\$62,364,718.09)	(\$102,200,320.72)	(\$64,250,700.28)	\$0.00	(\$64,250,700.28)	38.60%

End of Report

School District Five of Lexington and Richland

Board Report Expenditures

From Date: 1/1/2016

To Date: 1/31/2016

Fiscal Year: 2015-2016

☐ Subtotal by Collapse Mask

☐ Include pre encumbrance

☐ Print accounts with zero balance

☒ Filter Encumbrance Detail by Date Range

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.111.1000000.0000.000	Salaries	\$4,656,984.27	\$374,382.87	\$2,053,234.43	\$2,603,749.84	\$2,359,705.49	\$244,044.35	5.24%
100.111.2000000.0000.000	Employee Benefits	\$1,938,715.24	\$151,629.94	\$816,291.29	\$1,122,423.95	\$968,740.62	\$153,683.33	7.93%
100.111.3000000.0000.000	Purchased Services	\$2,720.00	\$438.00	\$570.00	\$2,150.00	\$0.00	\$2,150.00	79.04%
100.111.4000000.0000.000	Supplies and Materials	\$57,532.64	\$4,754.41	\$36,370.25	\$21,162.39	\$4,851.35	\$16,311.04	28.35%
	FUNCTION: Kindergarten Programs - 111	\$6,655,952.15	\$531,205.22	\$2,906,465.97	\$3,749,486.18	\$3,333,297.46	\$416,188.72	6.25%
100.112.1000000.0000.000	Salaries	\$11,345,892.27	\$994,618.16	\$5,479,782.80	\$5,866,109.47	\$6,438,881.39	(\$572,771.92)	-5.05%
100.112.2000000.0000.000	Employee Benefits	\$4,351,908.63	\$366,083.44	\$1,988,884.08	\$2,363,024.55	\$2,380,242.89	(\$17,218.34)	-0.40%
100.112.3000000.0000.000	Purchased Services	\$5,948.00	\$0.00	\$3,759.41	\$2,188.59	\$0.00	\$2,188.59	36.80%
100.112.4000000.0000.000	Supplies and Materials	\$260,655.36	\$11,515.24	\$123,362.80	\$137,292.56	\$21,110.78	\$116,181.78	44.57%
	FUNCTION: Primary Programs - 112	\$15,964,404.26	\$1,372,216.84	\$7,595,789.09	\$8,368,615.17	\$8,840,235.06	(\$471,619.89)	-2.95%
100.113.1000000.0000.000	Salaries	\$20,696,246.42	\$1,682,566.30	\$9,181,192.79	\$11,515,053.63	\$10,875,380.78	\$639,672.85	3.09%
100.113.2000000.0000.000	Employee Benefits	\$7,773,383.41	\$617,992.88	\$3,335,178.38	\$4,438,205.03	\$4,003,037.58	\$435,167.45	5.60%
100.113.3000000.0000.000	Purchased Services	\$19,532.00	\$1,542.24	\$7,121.32	\$12,410.68	\$500.00	\$11,910.68	60.98%
100.113.4000000.0000.000	Supplies and Materials	\$384,504.80	\$18,518.67	\$186,893.50	\$197,611.30	\$26,458.66	\$171,152.64	44.51%
	FUNCTION: Elementary Programs - 113	\$28,873,666.63	\$2,320,620.09	\$12,710,385.99	\$16,163,280.64	\$14,905,377.02	\$1,257,903.62	4.36%
100.114.1000000.0000.000	Salaries	\$16,450,141.17	\$1,351,140.41	\$7,496,266.28	\$8,953,874.89	\$8,634,147.23	\$319,727.66	1.94%
100.114.2000000.0000.000	Employee Benefits	\$5,915,526.00	\$463,575.32	\$2,545,147.91	\$3,370,378.09	\$2,977,335.09	\$393,043.00	6.64%
100.114.3000000.0000.000	Purchased Services	\$1,713,724.00	\$28,030.99	\$70,848.28	\$1,642,875.72	\$55,000.00	\$1,587,875.72	92.66%
100.114.4000000.0000.000	Supplies and Materials	\$478,885.00	\$4,728.10	\$205,016.53	\$273,868.47	\$17,860.80	\$256,007.67	53.46%
100.114.6000000.0000.000	Other Objects	\$6,100.00	\$0.00	\$5,100.00	\$1,000.00	\$0.00	\$1,000.00	16.39%
	FUNCTION: High School Programs - 114	\$24,564,376.17	\$1,847,474.82	\$10,322,379.00	\$14,241,997.17	\$11,684,343.12	\$2,557,654.05	10.41%
100.115.1000000.0000.000	Salaries	\$2,583,430.23	\$209,760.32	\$1,192,974.05	\$1,390,456.18	\$1,334,763.29	\$55,692.89	2.16%
100.115.2000000.0000.000	Employee Benefits	\$939,856.81	\$72,680.47	\$410,402.61	\$529,454.20	\$455,313.14	\$74,141.06	7.89%
100.115.3000000.0000.000	Purchased Services	\$600.00	\$0.00	\$356.18	\$243.82	\$0.00	\$243.82	40.64%
100.115.4000000.0000.000	Supplies and Materials	\$110,776.00	\$13,405.58	\$70,763.89	\$40,012.11	\$19,895.38	\$20,116.73	18.16%
	FUNCTION: Career and Technology Education (Vocational) Prog - 115	\$3,634,663.04	\$295,846.37	\$1,674,496.73	\$1,960,166.31	\$1,809,971.81	\$150,194.50	4.13%
100.121.1000000.0000.000	Salaries	\$624,446.90	\$55,188.60	\$293,489.03	\$330,957.87	\$334,299.27	(\$3,341.40)	-0.54%
100.121.2000000.0000.000	Employee Benefits	\$224,382.30	\$18,767.81	\$96,613.77	\$127,768.53	\$116,422.86	\$11,345.67	5.06%
100.121.4000000.0000.000	Supplies and Materials	\$1,260.00	\$144.99	\$686.03	\$573.97	\$0.00	\$573.97	45.55%
	FUNCTION: Educable Mentally Handicapped - 121	\$850,089.20	\$74,101.40	\$390,788.83	\$459,300.37	\$450,722.13	\$8,578.24	1.01%
100.122.1000000.0000.000	Salaries	\$447,279.00	\$37,308.14	\$183,632.42	\$263,646.58	\$199,962.99	\$63,683.59	14.24%
100.122.2000000.0000.000	Employee Benefits	\$182,948.61	\$14,496.27	\$73,601.44	\$109,347.17	\$82,703.92	\$26,643.25	14.56%
100.122.4000000.0000.000	Supplies and Materials	\$1,620.00	\$0.00	\$0.00	\$1,620.00	\$0.00	\$1,620.00	100.00%
	FUNCTION: Trainable Mentally Handicapped - 122	\$631,847.61	\$51,804.41	\$257,233.86	\$374,613.75	\$282,666.91	\$91,946.84	14.55%
100.123.1000000.0000.000	Salaries	\$33,054.00	\$0.00	\$0.00	\$33,054.00	\$0.00	\$33,054.00	100.00%
100.123.2000000.0000.000	Employee Benefits	\$13,222.00	\$0.00	\$0.00	\$13,222.00	\$0.00	\$13,222.00	100.00%
	FUNCTION: Orthopedically Handicapped - 123	\$46,276.00	\$0.00	\$0.00	\$46,276.00	\$0.00	\$46,276.00	100.00%
100.124.1000000.0000.000	Salaries	\$170,803.00	\$11,748.56	\$60,045.64	\$110,757.36	\$76,365.50	\$34,391.86	20.14%
100.124.2000000.0000.000	Employee Benefits	\$66,527.08	\$3,958.54	\$23,869.88	\$42,657.20	\$29,944.05	\$12,713.15	19.11%
100.124.4000000.0000.000	Supplies and Materials	\$140.00	\$0.00	\$0.00	\$140.00	\$0.00	\$140.00	100.00%
	FUNCTION: Visually Handicapped - 124	\$237,470.08	\$15,707.10	\$83,915.52	\$153,554.56	\$106,309.55	\$47,245.01	19.90%
100.125.1000000.0000.000	Salaries	\$276,178.00	\$20,680.25	\$107,283.49	\$168,894.51	\$115,958.49	\$52,936.02	19.17%
100.125.2000000.0000.000	Employee Benefits	\$97,566.96	\$6,625.81	\$33,339.57	\$64,227.39	\$39,798.50	\$24,428.89	25.04%

School District Five of Lexington and Richland

Board Report Expenditures

From Date: 1/1/2016

To Date: 1/31/2016

Fiscal Year: 2015-2016

☐ Subtotal by Collapse Mask

☐ Include pre encumbrance

☐ Print accounts with zero balance

☒ Filter Encumbrance Detail by Date Range

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.125.4000000.0000.000	Supplies and Materials	\$72.00	\$0.00	\$0.00	\$72.00	\$0.00	\$72.00	100.00%
	FUNCTION: Hearing Handicapped - 125	\$373,816.96	\$27,306.06	\$140,623.06	\$233,193.90	\$155,756.99	\$77,436.91	20.72%
100.126.1000000.0000.000	Salaries	\$1,479,641.69	\$129,478.43	\$697,978.79	\$781,662.90	\$808,951.50	(\$27,288.60)	-1.84%
100.126.2000000.0000.000	Employee Benefits	\$534,865.25	\$44,111.56	\$241,230.54	\$293,634.71	\$285,635.15	\$7,999.56	1.50%
100.126.4000000.0000.000	Supplies and Materials	\$5,490.00	\$343.72	\$2,181.36	\$3,308.64	\$0.00	\$3,308.64	60.27%
	FUNCTION: Speech Handicapped - 126	\$2,019,996.94	\$173,933.71	\$941,390.69	\$1,078,606.25	\$1,094,586.65	(\$15,980.40)	-0.79%
100.127.1000000.0000.000	Salaries	\$4,772,315.40	\$354,957.27	\$1,988,774.51	\$2,783,540.89	\$2,290,759.89	\$492,781.00	10.33%
100.127.2000000.0000.000	Employee Benefits	\$1,788,788.14	\$130,973.86	\$715,950.41	\$1,072,837.73	\$841,850.84	\$230,986.89	12.91%
100.127.3000000.0000.000	Purchased Services	\$750.00	\$0.00	\$0.00	\$750.00	\$750.00	\$0.00	0.00%
100.127.4000000.0000.000	Supplies and Materials	\$17,118.00	\$487.41	\$5,009.26	\$12,108.74	\$0.00	\$12,108.74	70.74%
	FUNCTION: Learning Disabilities - 127	\$6,578,971.54	\$486,418.54	\$2,709,734.18	\$3,869,237.36	\$3,133,360.73	\$735,876.63	11.19%
100.128.1000000.0000.000	Salaries	\$598,878.00	\$42,838.52	\$235,611.86	\$363,266.14	\$276,046.16	\$87,219.98	14.56%
100.128.2000000.0000.000	Employee Benefits	\$264,727.45	\$17,489.54	\$96,588.71	\$168,138.74	\$114,247.06	\$53,891.68	20.36%
100.128.4000000.0000.000	Supplies and Materials	\$2,349.00	\$77.00	\$708.23	\$1,640.77	\$137.44	\$1,503.33	64.00%
	FUNCTION: Emotionally Handicapped - 128	\$865,954.45	\$60,405.06	\$332,908.80	\$533,045.65	\$390,430.66	\$142,614.99	16.47%
100.129.1000000.0000.000	Salaries	\$262,051.50	\$34,545.39	\$129,522.03	\$132,529.47	\$153,071.85	(\$20,542.38)	-7.84%
100.129.2000000.0000.000	Employee Benefits	\$92,051.00	\$12,758.17	\$46,776.94	\$45,274.06	\$57,945.90	(\$12,671.84)	-13.77%
	FUNCTION: Coordinated Early Intervening Services (CEIS) - 129	\$354,102.50	\$47,303.56	\$176,298.97	\$177,803.53	\$211,017.75	(\$33,214.22)	-9.38%
100.135.1000000.0000.000	Salaries	\$5,000.00	\$416.66	\$2,291.63	\$2,708.37	\$2,708.37	\$0.00	0.00%
100.135.2000000.0000.000	Employee Benefits	\$1,185.50	\$96.78	\$535.72	\$649.78	\$628.58	\$21.20	1.79%
100.135.4000000.0000.000	Supplies and Materials	\$90.00	\$0.00	\$89.13	\$0.87	\$0.00	\$0.87	0.97%
	FUNCTION: Preschool Handicapped Speech (3 and 4 year olds) - 135	\$6,275.50	\$513.44	\$2,916.48	\$3,359.02	\$3,336.95	\$22.07	0.35%
100.136.1000000.0000.000	Salaries	\$8,314.20	\$967.96	\$5,323.78	\$2,990.42	\$6,291.71	(\$3,301.29)	-39.71%
100.136.2000000.0000.000	Employee Benefits	\$2,946.49	\$305.56	\$1,669.71	\$1,276.78	\$1,986.10	(\$709.32)	-24.07%
	FUNCTION: Preschool Handicapped Itinerant (3 and 4 yr olds) - 136	\$11,260.69	\$1,273.52	\$6,993.49	\$4,267.20	\$8,277.81	(\$4,010.61)	-35.62%
100.137.1000000.0000.000	Salaries	\$918,270.25	\$70,393.80	\$388,708.69	\$529,561.56	\$458,074.91	\$71,486.65	7.78%
100.137.2000000.0000.000	Employee Benefits	\$396,986.90	\$29,314.94	\$162,197.59	\$234,789.31	\$190,657.78	\$44,131.53	11.12%
100.137.4000000.0000.000	Supplies and Materials	\$540.00	\$0.00	\$70.69	\$469.31	\$0.00	\$469.31	86.91%
	FUNCTION: Preschool Hanicapped Self Contained (3 & 4 yr old) - 137	\$1,315,797.15	\$99,708.74	\$550,976.97	\$764,820.18	\$648,732.69	\$116,087.49	8.82%
100.138.1000000.0000.000	Salaries	\$5,055.55	\$508.88	\$2,798.84	\$2,256.71	\$3,307.74	(\$1,051.03)	-20.79%
100.138.2000000.0000.000	Employee Benefits	\$2,169.85	\$168.22	\$919.74	\$1,250.11	\$1,093.46	\$156.65	7.22%
	FUNCTION: Preschool Handicapped Homebased (3 & 4 yr olds) - 138	\$7,225.40	\$677.10	\$3,718.58	\$3,506.82	\$4,401.20	(\$894.38)	-12.38%
100.139.1000000.0000.000	Salaries	\$968,017.28	\$80,876.83	\$450,203.89	\$517,813.39	\$530,703.35	(\$12,889.96)	-1.33%
100.139.2000000.0000.000	Employee Benefits	\$407,240.05	\$33,202.98	\$173,892.72	\$233,347.33	\$215,204.16	\$18,143.17	4.46%
100.139.3000000.0000.000	Purchased Services	\$17,900.00	\$960.07	\$3,201.57	\$14,698.43	\$0.00	\$14,698.43	82.11%
100.139.4000000.0000.000	Supplies and Materials	\$39,035.74	\$1,323.74	\$6,324.38	\$32,711.36	\$1,441.72	\$31,269.64	80.11%
100.139.6000000.0000.000	Other Objects	\$250.00	\$45.00	\$45.00	\$205.00	\$0.00	\$205.00	82.00%
	FUNCTION: Early Childhood Programs - 139	\$1,432,443.07	\$116,408.62	\$633,667.56	\$798,775.51	\$747,349.23	\$51,426.28	3.59%
100.141.1000000.0000.000	Salaries	\$1,271,017.88	\$92,378.88	\$503,223.84	\$767,794.04	\$593,441.91	\$174,352.13	13.72%
100.141.2000000.0000.000	Employee Benefits	\$485,133.49	\$33,970.33	\$183,432.54	\$301,700.95	\$219,176.99	\$82,523.96	17.01%
100.141.3000000.0000.000	Purchased Services	\$3,060.00	\$0.00	\$2,229.00	\$831.00	\$0.00	\$831.00	27.16%
100.141.4000000.0000.000	Supplies and Materials	\$11,040.00	\$0.00	\$952.98	\$10,087.02	\$0.00	\$10,087.02	91.37%
	FUNCTION: Gifted and Talented Academic - 141	\$1,770,251.37	\$126,349.21	\$689,838.36	\$1,080,413.01	\$812,618.90	\$267,794.11	15.13%

School District Five of Lexington and Richland

Board Report Expenditures

From Date: 1/1/2016

To Date: 1/31/2016

Fiscal Year: 2015-2016

☐ Subtotal by Collapse Mask

☐ Include pre encumbrance

☐ Print accounts with zero balance

☒ Filter Encumbrance Detail by Date Range

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.143.1000000.0000.000	Salaries	\$355,953.61	\$28,781.14	\$158,296.27	\$197,657.34	\$188,587.12	\$9,070.22	2.55%
100.143.2000000.0000.000	Employee Benefits	\$125,461.75	\$9,988.31	\$54,410.44	\$71,051.31	\$65,518.19	\$5,533.12	4.41%
	FUNCTION: Advanced Placement - 143	\$481,415.36	\$38,769.45	\$212,706.71	\$268,708.65	\$254,105.31	\$14,603.34	3.03%
100.145.1000000.0000.000	Salaries	\$67,000.00	\$22,827.70	\$64,436.14	\$2,563.86	\$8,569.52	(\$6,005.66)	-8.96%
100.145.2000000.0000.000	Employee Benefits	\$17,000.00	\$5,044.41	\$14,065.36	\$2,934.64	\$1,939.54	\$995.10	5.85%
100.145.3000000.0000.000	Purchased Services	\$16,000.00	\$275.00	\$1,625.00	\$14,375.00	\$0.00	\$14,375.00	89.84%
	FUNCTION: Homebound - 145	\$100,000.00	\$28,147.11	\$80,126.50	\$19,873.50	\$10,509.06	\$9,364.44	9.36%
100.148.1000000.0000.000	Salaries	\$92,498.78	\$8,535.70	\$45,770.91	\$46,727.87	\$52,279.06	(\$5,551.19)	-6.00%
100.148.2000000.0000.000	Employee Benefits	\$31,020.54	\$2,819.16	\$15,116.77	\$15,903.77	\$17,518.23	(\$1,614.46)	-5.20%
100.148.3000000.0000.000	Purchased Services	\$3,945.00	\$0.00	\$96.00	\$3,849.00	\$0.00	\$3,849.00	97.57%
100.148.4000000.0000.000	Supplies and Materials	\$5,008.60	\$0.00	\$0.00	\$5,008.60	\$0.00	\$5,008.60	100.00%
	FUNCTION: Gifted and Talented Artistic - 148	\$132,472.92	\$11,354.86	\$60,983.68	\$71,489.24	\$69,797.29	\$1,691.95	1.28%
100.149.1000000.0000.000	Salaries	\$679,055.50	\$69,650.92	\$352,248.80	\$326,806.70	\$252,614.27	\$74,192.43	10.93%
100.149.2000000.0000.000	Employee Benefits	\$245,462.72	\$21,094.88	\$107,242.20	\$138,220.52	\$99,099.07	\$39,121.45	15.94%
100.149.3000000.0000.000	Purchased Services	\$0.00	\$196,957.02	\$898,051.46	(\$898,051.46)	\$0.00	(\$898,051.46)	0.00%
	FUNCTION: Other Special Programs - 149	\$924,518.22	\$287,702.82	\$1,357,542.46	(\$433,024.24)	\$351,713.34	(\$784,737.58)	-84.88%
100.161.1000000.0000.000	Salaries	\$929,053.00	\$82,903.44	\$442,988.39	\$486,064.61	\$536,777.03	(\$50,712.42)	-5.46%
100.161.2000000.0000.000	Employee Benefits	\$382,966.16	\$33,331.19	\$177,776.05	\$205,190.11	\$222,297.64	(\$17,107.53)	-4.47%
100.161.3000000.0000.000	Purchased Services	\$0.00	\$0.00	\$315.00	(\$315.00)	\$0.00	(\$315.00)	0.00%
100.161.4000000.0000.000	Supplies and Materials	\$3,060.00	\$261.28	\$1,022.72	\$2,037.28	\$0.00	\$2,037.28	66.58%
	FUNCTION: Other Exceptional Programs - 161	\$1,315,079.16	\$116,495.91	\$622,102.16	\$692,977.00	\$759,074.67	(\$66,097.67)	-5.03%
100.172.1000000.0000.000	Salaries	\$40,000.00	\$0.00	\$1,350.00	\$38,650.00	\$0.00	\$38,650.00	96.63%
100.172.2000000.0000.000	Employee Benefits	\$10,000.00	\$0.00	\$324.53	\$9,675.47	\$0.00	\$9,675.47	96.75%
	FUNCTION: Elementary Summer School - 172	\$50,000.00	\$0.00	\$1,674.53	\$48,325.47	\$0.00	\$48,325.47	96.65%
100.173.1000000.0000.000	Salaries	\$40,000.00	\$0.00	\$27,337.20	\$12,662.80	\$0.00	\$12,662.80	31.66%
100.173.2000000.0000.000	Employee Benefits	\$10,000.00	\$0.00	\$6,106.50	\$3,893.50	\$0.00	\$3,893.50	38.94%
	FUNCTION: High School Summer School - 173	\$50,000.00	\$0.00	\$33,443.70	\$16,556.30	\$0.00	\$16,556.30	33.11%
100.181.1000000.0000.000	Salaries	\$212,428.00	\$17,702.32	\$123,916.24	\$88,511.76	\$88,511.76	\$0.00	0.00%
100.181.2000000.0000.000	Employee Benefits	\$65,596.09	\$5,156.60	\$36,686.54	\$28,909.55	\$25,783.04	\$3,126.51	4.77%
100.181.3000000.0000.000	Purchased Services	\$5,000.00	\$0.00	\$775.73	\$4,224.27	\$0.00	\$4,224.27	84.49%
100.181.6000000.0000.000	Other Objects	\$800.00	\$0.00	\$441.00	\$359.00	\$0.00	\$359.00	44.88%
	FUNCTION: Adult Basic Education Programs - 181	\$283,824.09	\$22,858.92	\$161,819.51	\$122,004.58	\$114,294.80	\$7,709.78	2.72%
100.182.3000000.0000.000	Purchased Services	\$500.00	\$90.00	\$294.75	\$205.25	\$0.00	\$205.25	41.05%
100.182.4000000.0000.000	Supplies and Materials	\$7,130.00	\$746.31	\$5,598.32	\$1,531.68	\$23.54	\$1,508.14	21.15%
	FUNCTION: Adult Secondary Education Programs - 182	\$7,630.00	\$836.31	\$5,893.07	\$1,736.93	\$23.54	\$1,713.39	22.46%
100.188.1000000.0000.000	Salaries	\$0.00	\$3,996.70	\$23,980.20	(\$23,980.20)	\$23,980.00	(\$47,960.20)	0.00%
100.188.2000000.0000.000	Employee Benefits	\$0.00	\$1,706.22	\$10,078.79	(\$10,078.79)	\$10,237.28	(\$20,316.07)	0.00%
	FUNCTION: Parenting/Family Literacy - 188	\$0.00	\$5,702.92	\$34,058.99	(\$34,058.99)	\$34,217.28	(\$68,276.27)	0.00%
100.190.1000000.0000.000	Salaries	\$538,977.00	\$37,152.92	\$218,474.09	\$320,502.91	\$240,454.59	\$80,048.32	14.85%
100.190.2000000.0000.000	Employee Benefits	\$124,107.00	\$8,980.78	\$51,882.68	\$72,224.32	\$57,607.84	\$14,616.48	11.78%
100.190.6000000.0000.000	Other Objects	\$20,800.00	\$307.50	\$6,513.86	\$14,286.14	\$0.00	\$14,286.14	68.68%

School District Five of Lexington and Richland

Board Report Expenditures

From Date: 1/1/2016

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Fiscal Year: 2015-2016

☐ Subtotal by Collapse Mask

☐ Include pre encumbrance

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☒ Filter Encumbrance Detail by Date Range

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
	FUNCTION: Instructional Pupil Activity - 190	\$683,884.00	\$46,441.20	\$276,870.63	\$407,013.37	\$298,062.43	\$108,950.94	15.93%
100.211.1000000.0000.000	Salaries	\$834,655.00	\$75,144.14	\$446,704.18	\$387,950.82	\$455,005.41	(\$67,054.59)	-8.03%
100.211.2000000.0000.000	Employee Benefits	\$367,537.45	\$29,814.83	\$172,424.11	\$195,113.34	\$182,414.61	\$12,698.73	3.46%
100.211.3000000.0000.000	Purchased Services	\$6,032.00	\$804.75	\$1,762.99	\$4,269.01	\$0.00	\$4,269.01	70.77%
100.211.4000000.0000.000	Supplies and Materials	\$1,858.00	\$124.00	\$303.79	\$1,554.21	\$642.00	\$912.21	49.10%
	FUNCTION: Attendance and Social Work Services - 211	\$1,210,082.45	\$105,887.72	\$621,195.07	\$588,887.38	\$638,062.02	(\$49,174.64)	-4.06%
100.212.1000000.0000.000	Salaries	\$3,218,707.00	\$257,380.80	\$1,578,078.83	\$1,640,628.17	\$1,552,301.94	\$88,326.23	2.74%
100.212.2000000.0000.000	Employee Benefits	\$1,164,323.05	\$90,657.24	\$541,933.05	\$622,390.00	\$548,448.17	\$73,941.83	6.35%
100.212.3000000.0000.000	Purchased Services	\$2,560.50	\$890.27	\$1,362.77	\$1,197.73	\$0.00	\$1,197.73	46.78%
100.212.4000000.0000.000	Supplies and Materials	\$18,612.50	\$340.96	\$6,888.50	\$11,724.00	\$0.00	\$11,724.00	62.99%
	FUNCTION: Guidance Services - 212	\$4,404,203.05	\$349,269.27	\$2,128,263.15	\$2,275,939.90	\$2,100,750.11	\$175,189.79	3.98%
100.213.1000000.0000.000	Salaries	\$1,553,505.02	\$129,555.00	\$716,799.84	\$836,705.18	\$841,999.25	(\$5,294.07)	-0.34%
100.213.2000000.0000.000	Employee Benefits	\$583,881.88	\$47,479.16	\$254,490.39	\$329,391.49	\$309,342.48	\$20,049.01	3.43%
100.213.3000000.0000.000	Purchased Services	\$3,000.00	\$138.00	\$211.76	\$2,788.24	\$0.00	\$2,788.24	92.94%
100.213.4000000.0000.000	Supplies and Materials	\$25,497.00	\$2,231.80	\$12,070.15	\$13,426.85	\$0.00	\$13,426.85	52.66%
100.213.6000000.0000.000	Other Objects	\$345.00	\$0.00	\$110.00	\$235.00	\$0.00	\$235.00	68.12%
	FUNCTION: Health Services - 213	\$2,166,228.90	\$179,403.96	\$983,682.14	\$1,182,546.76	\$1,151,341.73	\$31,205.03	1.44%
100.214.1000000.0000.000	Salaries	\$1,212,682.85	\$92,736.06	\$556,416.36	\$656,266.49	\$572,947.51	\$83,318.98	6.87%
100.214.2000000.0000.000	Employee Benefits	\$383,596.06	\$29,185.72	\$171,313.93	\$212,282.13	\$181,734.82	\$30,547.31	7.96%
100.214.3000000.0000.000	Purchased Services	\$6,000.00	\$0.00	\$0.00	\$6,000.00	\$0.00	\$6,000.00	100.00%
100.214.4000000.0000.000	Supplies and Materials	\$5,850.00	\$0.00	\$0.00	\$5,850.00	\$0.00	\$5,850.00	100.00%
	FUNCTION: Psychological Services - 214	\$1,608,128.91	\$121,921.78	\$727,730.29	\$880,398.62	\$754,682.33	\$125,716.29	7.82%
100.217.1000000.0000.000	Salaries	\$77,682.00	\$6,473.48	\$45,314.36	\$32,367.64	\$32,367.32	\$0.32	0.00%
100.217.2000000.0000.000	Employee Benefits	\$26,975.81	\$2,258.50	\$15,626.39	\$11,349.42	\$11,292.48	\$56.94	0.21%
100.217.4000000.0000.000	Supplies and Materials	\$1,095.00	\$59.78	\$200.74	\$894.26	\$0.00	\$894.26	81.67%
	FUNCTION: Career Specialist Services - 217	\$105,752.81	\$8,791.76	\$61,141.49	\$44,611.32	\$43,659.80	\$951.52	0.90%
100.221.1000000.0000.000	Salaries	\$2,089,965.10	\$255,000.69	\$1,627,986.38	\$461,978.72	\$1,438,135.55	(\$976,156.83)	-46.71%
100.221.2000000.0000.000	Employee Benefits	\$697,457.60	\$81,502.02	\$515,296.54	\$182,161.06	\$458,861.20	(\$276,700.14)	-39.67%
100.221.3000000.0000.000	Purchased Services	\$582,487.00	\$34,522.79	\$211,528.77	\$370,958.23	\$46,596.70	\$324,361.53	55.69%
100.221.4000000.0000.000	Supplies and Materials	\$144,440.00	\$1,949.91	\$55,088.01	\$89,351.99	\$920.16	\$88,431.83	61.22%
100.221.6000000.0000.000	Other Objects	\$3,331.00	\$0.00	\$2,676.50	\$654.50	\$0.00	\$654.50	19.65%
	FUNCTION: Improvement of Instruction Curriculum Development - 221	\$3,517,680.70	\$372,975.41	\$2,412,576.20	\$1,105,104.50	\$1,944,513.61	(\$839,409.11)	-23.86%
100.222.1000000.0000.000	Salaries	\$1,743,924.50	\$145,754.73	\$798,083.65	\$945,840.85	\$927,912.17	\$17,928.68	1.03%
100.222.2000000.0000.000	Employee Benefits	\$693,795.04	\$54,360.62	\$291,403.31	\$402,391.73	\$349,063.08	\$53,328.65	7.69%
100.222.3000000.0000.000	Purchased Services	\$500.00	\$90.00	\$90.00	\$410.00	\$0.00	\$410.00	82.00%
100.222.4000000.0000.000	Supplies and Materials	\$253,443.00	\$22,713.46	\$112,841.84	\$140,601.16	\$23,165.19	\$117,435.97	46.34%
100.222.6000000.0000.000	Other Objects	\$0.00	\$175.00	\$175.00	(\$175.00)	\$0.00	(\$175.00)	0.00%
	FUNCTION: Library and Media Services - 222	\$2,691,662.54	\$223,093.81	\$1,202,593.80	\$1,489,068.74	\$1,300,140.44	\$188,928.30	7.02%
100.223.1000000.0000.000	Salaries	\$505,552.40	\$45,637.46	\$296,164.90	\$209,387.50	\$227,094.90	(\$17,707.40)	-3.50%
100.223.2000000.0000.000	Employee Benefits	\$170,611.88	\$14,983.08	\$96,050.78	\$74,561.10	\$74,947.21	(\$386.11)	-0.23%
100.223.3000000.0000.000	Purchased Services	\$15,000.00	\$1,332.78	\$1,755.19	\$13,244.81	\$0.00	\$13,244.81	88.30%
100.223.4000000.0000.000	Supplies and Materials	\$540.00	\$0.00	\$0.00	\$540.00	\$0.00	\$540.00	100.00%
100.223.6000000.0000.000	Other Objects	\$0.00	\$0.00	\$175.50	(\$175.50)	\$0.00	(\$175.50)	0.00%
	FUNCTION: Supervision of Special Programs - 223	\$691,704.28	\$61,953.32	\$394,146.37	\$297,557.91	\$302,042.11	(\$4,484.20)	-0.65%

School District Five of Lexington and Richland

Board Report Expenditures

From Date: 1/1/2016

To Date: 1/31/2016

Fiscal Year: 2015-2016

☐ Subtotal by Collapse Mask

☐ Include pre encumbrance

☐ Print accounts with zero balance

☒ Filter Encumbrance Detail by Date Range

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.224.1000000.0000.000	Salaries	\$0.00	\$0.00	\$1,615.59	(\$1,615.59)	\$0.00	(\$1,615.59)	0.00%
100.224.2000000.0000.000	Employee Benefits	\$0.00	\$0.00	\$388.40	(\$388.40)	\$0.00	(\$388.40)	0.00%
100.224.3000000.0000.000	Purchased Services	\$84,005.50	\$4,102.81	\$28,203.88	\$55,801.62	\$1,159.46	\$54,642.16	65.05%
100.224.4000000.0000.000	Supplies and Materials	\$8,962.00	\$174.04	\$2,411.32	\$6,550.68	\$0.00	\$6,550.68	73.09%
FUNCTION: Improvement of Instruction Inservice & Staff Train - 224		\$92,967.50	\$4,276.85	\$32,619.19	\$60,348.31	\$1,159.46	\$59,188.85	63.67%
100.231.1000000.0000.000	Salaries	\$67,200.00	\$4,800.00	\$33,600.00	\$33,600.00	\$24,000.00	\$9,600.00	14.29%
100.231.2000000.0000.000	Employee Benefits	\$15,933.12	\$1,153.92	\$8,077.44	\$7,855.68	\$5,769.60	\$2,086.08	13.09%
100.231.3000000.0000.000	Purchased Services	\$330,275.00	\$51,478.37	\$204,737.99	\$125,537.01	\$23,375.00	\$102,162.01	30.93%
100.231.6000000.0000.000	Other Objects	\$367,225.00	\$0.00	\$165,313.50	\$201,911.50	\$0.00	\$201,911.50	54.98%
FUNCTION: Board of Education - 231		\$780,633.12	\$57,432.29	\$411,728.93	\$368,904.19	\$53,144.60	\$315,759.59	40.45%
100.232.1000000.0000.000	Salaries	\$264,398.00	\$22,033.20	\$155,425.80	\$108,972.20	\$110,166.00	(\$1,193.80)	-0.45%
100.232.2000000.0000.000	Employee Benefits	\$77,125.38	\$6,338.60	\$41,283.02	\$35,842.36	\$31,693.00	\$4,149.36	5.38%
100.232.3000000.0000.000	Purchased Services	\$11,950.44	\$543.03	\$6,125.65	\$5,824.79	\$576.79	\$5,248.00	43.91%
100.232.4000000.0000.000	Supplies and Materials	\$6,723.00	\$437.74	\$2,575.03	\$4,147.97	\$0.00	\$4,147.97	61.70%
100.232.6000000.0000.000	Other Objects	\$7,100.00	\$0.00	\$1,542.00	\$5,558.00	\$0.00	\$5,558.00	78.28%
FUNCTION: Office of Superintendent - 232		\$367,296.82	\$29,352.57	\$206,951.50	\$160,345.32	\$142,435.79	\$17,909.53	4.88%
100.233.1000000.0000.000	Salaries	\$9,384,605.18	\$707,466.46	\$4,684,997.77	\$4,699,607.41	\$3,769,208.08	\$930,399.33	9.91%
100.233.2000000.0000.000	Employee Benefits	\$3,376,930.92	\$249,006.64	\$1,612,863.43	\$1,764,067.49	\$1,340,408.67	\$423,658.82	12.55%
100.233.3000000.0000.000	Purchased Services	\$187,884.83	\$6,478.61	\$55,973.39	\$131,911.44	\$6,157.99	\$125,753.45	66.93%
100.233.4000000.0000.000	Supplies and Materials	\$240,611.29	\$11,706.98	\$93,762.22	\$146,849.07	\$9,028.90	\$137,820.17	57.28%
100.233.6000000.0000.000	Other Objects	\$20,529.22	\$32.92	\$12,584.65	\$7,944.57	\$522.85	\$7,421.72	36.15%
FUNCTION: School Administration - 233		\$13,210,561.44	\$974,691.61	\$6,460,181.46	\$6,750,379.98	\$5,125,326.49	\$1,625,053.49	12.30%
100.251.3000000.0000.000	Purchased Services	\$275,000.00	\$21,309.50	\$72,878.22	\$202,121.78	\$100,289.28	\$101,832.50	37.03%
FUNCTION: Student Transportation (Federal/District Mandated) - 251		\$275,000.00	\$21,309.50	\$72,878.22	\$202,121.78	\$100,289.28	\$101,832.50	37.03%
100.252.1000000.0000.000	Salaries	\$773,981.00	\$69,676.71	\$479,218.18	\$294,762.82	\$324,126.32	(\$29,363.50)	-3.79%
100.252.2000000.0000.000	Employee Benefits	\$280,957.52	\$25,069.43	\$165,375.55	\$115,581.97	\$117,404.03	(\$1,822.06)	-0.65%
100.252.3000000.0000.000	Purchased Services	\$112,692.00	\$6,398.40	\$57,593.36	\$55,098.64	\$9,292.79	\$45,805.85	40.65%
100.252.4000000.0000.000	Supplies and Materials	\$53,955.00	\$941.62	\$8,515.69	\$45,439.31	\$5,892.17	\$39,547.14	73.30%
100.252.5000000.0000.000	Capital Outlay	\$6,250.00	\$0.00	\$0.00	\$6,250.00	\$0.00	\$6,250.00	100.00%
100.252.6000000.0000.000	Other Objects	\$3,600.00	\$1,404.00	\$1,888.00	\$1,712.00	\$0.00	\$1,712.00	47.56%
FUNCTION: Fiscal Services - 252		\$1,231,435.52	\$103,490.16	\$712,590.78	\$518,844.74	\$456,715.31	\$62,129.43	5.05%
100.254.1000000.0000.000	Salaries	\$6,220,461.99	\$515,798.86	\$3,617,421.69	\$2,603,040.30	\$2,464,774.12	\$138,266.18	2.22%
100.254.2000000.0000.000	Employee Benefits	\$3,542,712.92	\$452,891.53	\$1,909,239.55	\$1,633,473.37	\$997,961.31	\$635,512.06	17.94%
100.254.3000000.0000.000	Purchased Services	\$4,505,827.90	\$334,103.72	\$2,572,065.09	\$1,933,762.81	\$880,843.65	\$1,052,919.16	23.37%
100.254.4000000.0000.000	Supplies and Materials	\$5,539,156.00	\$435,569.07	\$2,685,259.66	\$2,853,896.34	\$72,553.54	\$2,781,342.80	50.21%
100.254.5000000.0000.000	Capital Outlay	\$116,723.10	\$0.00	\$82,223.10	\$34,500.00	\$44,405.00	(\$9,905.00)	-8.49%
100.254.6000000.0000.000	Other Objects	\$3,556.00	\$0.00	\$1,524.16	\$2,031.84	\$2,172.00	(\$140.16)	-3.94%
FUNCTION: Operation and Maintenance of Plant - 254		\$19,928,437.91	\$1,738,363.18	\$10,867,733.25	\$9,060,704.66	\$4,462,709.62	\$4,597,995.04	23.07%
100.255.1000000.0000.000	Salaries	\$3,133,318.23	\$260,529.44	\$1,585,108.15	\$1,548,210.08	\$1,517,155.25	\$31,054.83	0.99%
100.255.2000000.0000.000	Employee Benefits	\$903,845.78	\$99,035.31	\$584,855.02	\$318,990.76	\$609,153.86	(\$290,163.10)	-32.10%
100.255.3000000.0000.000	Purchased Services	\$149,893.40	\$5,455.00	\$52,078.02	\$97,815.38	\$18,930.97	\$78,884.41	52.63%
100.255.4000000.0000.000	Supplies and Materials	\$61,980.00	\$11,229.90	\$31,714.60	\$30,265.40	\$14,368.79	\$15,896.61	25.65%
100.255.6000000.0000.000	Other Objects	\$500.00	\$56.00	\$184.00	\$316.00	\$0.00	\$316.00	63.20%
FUNCTION: Student Transportation (State Mandated) - 255		\$4,249,537.41	\$376,305.65	\$2,253,939.79	\$1,995,597.62	\$2,159,608.87	(\$164,011.25)	-3.88%

School District Five of Lexington and Richland

Board Report Expenditures

From Date: 1/1/2016

To Date: 1/31/2016

Fiscal Year: 2015-2016

☐ Subtotal by Collapse Mask

☐ Include pre encumbrance

☐ Print accounts with zero balance

☒ Filter Encumbrance Detail by Date Range

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.257.1000000.0000.000	Salaries	\$251,822.40	\$20,786.36	\$136,505.56	\$115,316.84	\$112,781.79	\$2,535.05	1.01%
100.257.2000000.0000.000	Employee Benefits	\$94,460.36	\$5,628.58	\$46,902.48	\$47,557.88	\$41,675.32	\$5,882.56	6.23%
100.257.3000000.0000.000	Purchased Services	\$650,654.88	\$60,840.58	\$303,867.79	\$346,787.09	\$332,741.83	\$14,045.26	2.16%
100.257.4000000.0000.000	Supplies and Materials	\$52,639.00	\$3,504.84	\$23,551.28	\$29,087.72	\$7,893.12	\$21,194.60	40.26%
	FUNCTION: Internal Services - 257	\$1,049,576.64	\$90,760.36	\$510,827.11	\$538,749.53	\$495,092.06	\$43,657.47	4.16%
100.258.1000000.0000.000	Salaries	\$70,906.00	\$6,282.45	\$42,888.02	\$28,017.98	\$29,687.10	(\$1,669.12)	-2.35%
100.258.2000000.0000.000	Employee Benefits	\$25,369.22	\$2,213.65	\$15,050.05	\$10,319.17	\$10,650.35	(\$331.18)	-1.31%
100.258.3000000.0000.000	Purchased Services	\$1,256,054.71	\$371,071.13	\$700,308.83	\$555,745.88	\$620,146.68	(\$64,400.80)	-5.13%
100.258.4000000.0000.000	Supplies and Materials	\$900.00	\$0.00	\$24.00	\$876.00	\$0.00	\$876.00	97.33%
100.258.5000000.0000.000	Capital Outlay	\$410.00	\$34.22	\$34.22	\$375.78	\$0.00	\$375.78	91.65%
	FUNCTION: Security - 258	\$1,353,639.93	\$379,601.45	\$758,305.12	\$595,334.81	\$660,484.13	(\$65,149.32)	-4.81%
100.263.1000000.0000.000	Salaries	\$846,763.61	\$68,998.48	\$491,218.70	\$355,544.91	\$342,966.53	\$12,578.38	1.49%
100.263.2000000.0000.000	Employee Benefits	\$281,878.80	\$20,907.51	\$150,247.02	\$131,631.78	\$105,791.18	\$25,840.60	9.17%
100.263.3000000.0000.000	Purchased Services	\$80,309.00	\$2,089.74	\$55,062.48	\$25,246.52	\$2,228.76	\$23,017.76	28.66%
100.263.4000000.0000.000	Supplies and Materials	\$33,146.00	\$1,449.02	\$10,663.58	\$22,482.42	\$2,757.58	\$19,724.84	59.51%
100.263.6000000.0000.000	Other Objects	\$12,700.00	\$78.82	(\$1,196.11)	\$13,896.11	\$7,590.00	\$6,306.11	49.65%
	FUNCTION: Information Services - 263	\$1,254,797.41	\$93,523.57	\$705,995.67	\$548,801.74	\$461,334.05	\$87,467.69	6.97%
100.264.1000000.0000.000	Salaries	\$609,751.48	\$61,282.30	\$389,730.76	\$220,020.72	\$295,760.36	(\$75,739.64)	-12.42%
100.264.2000000.0000.000	Employee Benefits	\$216,889.52	\$19,644.82	\$126,168.86	\$90,720.66	\$97,429.11	(\$6,708.45)	-3.09%
100.264.3000000.0000.000	Purchased Services	\$78,744.00	\$1,412.00	\$8,031.14	\$70,712.86	\$3,220.00	\$67,492.86	85.71%
100.264.4000000.0000.000	Supplies and Materials	\$59,527.00	\$220.17	\$4,403.13	\$55,123.87	\$733.60	\$54,390.27	91.37%
100.264.6000000.0000.000	Other Objects	\$0.00	\$0.00	\$526.50	(\$526.50)	\$0.00	\$526.50	0.00%
	FUNCTION: Staff Services - 264	\$964,912.00	\$82,559.29	\$528,860.39	\$436,051.61	\$397,143.07	\$38,908.54	4.03%
100.266.1000000.0000.000	Salaries	\$1,477,028.48	\$121,750.76	\$841,152.29	\$635,876.19	\$646,468.14	(\$10,591.95)	-0.72%
100.266.2000000.0000.000	Employee Benefits	\$580,847.52	\$40,400.89	\$277,813.40	\$303,034.12	\$215,869.32	\$87,164.80	15.01%
100.266.3000000.0000.000	Purchased Services	\$156,148.19	\$364.46	\$70,005.71	\$86,142.48	\$35,313.23	\$50,829.25	32.55%
100.266.4000000.0000.000	Supplies and Materials	\$13,919.31	\$239.26	\$10,482.75	\$3,436.56	\$113.39	\$3,323.17	23.87%
100.266.6000000.0000.000	Other Objects	\$175.50	\$0.00	\$175.50	\$0.00	\$0.00	\$0.00	0.00%
	FUNCTION: Technology and Data Processing Services - 266	\$2,228,119.00	\$162,755.37	\$1,199,629.65	\$1,028,489.35	\$897,764.08	\$130,725.27	5.87%
100.271.1000000.0000.000	Salaries	\$1,357,263.67	\$106,627.86	\$803,498.69	\$553,764.98	\$636,775.82	(\$83,010.84)	-6.12%
100.271.2000000.0000.000	Employee Benefits	\$354,915.54	\$28,452.89	\$195,478.54	\$159,437.00	\$165,134.23	(\$5,697.23)	-1.61%
100.271.3000000.0000.000	Purchased Services	\$55,824.00	\$452.50	\$173,286.26	(\$117,462.26)	\$22,266.68	(\$139,728.94)	-250.30%
100.271.6000000.0000.000	Other Objects	\$364,400.00	\$0.00	\$307,000.00	\$57,400.00	\$0.00	\$57,400.00	15.75%
	FUNCTION: Pupil Service Activities - 271	\$2,132,403.21	\$135,533.25	\$1,479,263.49	\$653,139.72	\$824,176.73	(\$171,037.01)	-8.02%
100.390.3000000.0000.000	Purchased Services	\$15,000.00	\$1,500.00	\$7,500.00	\$7,500.00	\$7,500.00	\$0.00	0.00%
100.390.4000000.0000.000	Supplies and Materials	\$5,850.00	\$0.00	\$32.00	\$5,818.00	\$0.00	\$5,818.00	99.45%
	FUNCTION: Other Community Services - 390	\$20,850.00	\$1,500.00	\$7,532.00	\$13,318.00	\$7,500.00	\$5,818.00	27.90%
100.412.7000000.0000.000	Transfers	\$20,000.00	\$0.00	\$44,528.76	(\$24,528.76)	\$0.00	(\$24,528.76)	-122.64%
	FUNCTION: Payments to Other Governmental Units - 412	\$20,000.00	\$0.00	\$44,528.76	(\$24,528.76)	\$0.00	(\$24,528.76)	-122.64%
100.425.7000000.0000.000	Transfers	\$511,745.00	\$0.00	\$0.00	\$511,745.00	\$0.00	\$511,745.00	100.00%
	FUNCTION: Transfer to Food Service Fund - 425	\$511,745.00	\$0.00	\$0.00	\$511,745.00	\$0.00	\$511,745.00	100.00%

School District Five of Lexington and Richland

Board Report Expenditures

From Date: 1/1/2016

To Date: 1/31/2016

Fiscal Year: 2015-2016

☐ Subtotal by Collapse Mask

☐ Include pre encumbrance

☐ Print accounts with zero balance

☒ Filter Encumbrance Detail by Date Range

Account Number

Description

GL Budget

Range To Date

YTD

Balance

Encumbrance

Budget Balance % Bud

Grand Total:

\$166,291,021.00

\$13,882,335.44

\$79,762,637.89

\$86,528,383.11

\$74,994,666.03

\$11,533,717.08

6.94%


End of Report



MEMORANDUM

To: Members of the Board of Trustees

Through: Stephen W. Hefner, Ed. D.
Superintendent

From: A. Len Richardson
Chief Finance Officer 

Date: February 17, 2016

Re: Proposed FY2017 Five (5) Year Capital Budget Plan

The proposed Five (5) Year Capital Budget Plan for FY2017 has been developed for consideration. This plan is designed to insure the district maintains the physical plants, while addressing other necessary equipment priorities. The established priorities include necessary roof replacements, Heating, Ventilation, and Air Conditioning (HVAC) system replacements, technology, activity bus replacement, curriculum related renovations, and funds for contingencies.

Administrative Consideration: The five year proposal is based on the projected amount of funds available at the current millage rate of 52.5 mills for capital needs. Although this is a five year plan, an updated proposal will be presented annually for Board approval. However, approval of the proposed Five (5) Year Capital Plan is requested, so staff can continue to allocate labor and effort towards the accomplishment of the overall plan.

Recommendation: The administration recommends second reading approval of the proposed Five (5) Year Capital Budget Plan and funding for FY2017.

School District 5 of Lexington and Richland Counties
Five (5) Year Capital Budget Plan Proposal
Second Reading

A	B	C	D	E	F	G
	Proposed FY 2016-17	Proposed FY 2017-18	Proposed FY 2018-19	Proposed FY 2019-20	Proposed FY 2020-21	Total
Projected Revenue	10,000,000.00	10,000,000.00	10,000,000.00	10,000,000.00	10,000,000.00	50,000,000.00

Maintenance and New Initiatives

1	041 Chapin Elementary						1
2	Construct Parking Lot	305,016				305,016	2
3	048 Harbison West Elementary						3
4	Replace HVAC Phase I, Lighting & Ceilings			1,862,420		1,862,420	4
5	Replace HVAC Phase II, Lighting & Ceilings				2,304,137	2,304,137	5
6	052 Lake Murray Elementary						6
7	Replace HVAC Phase I, Lighting & Ceilings	1,318,914				1,318,914	7
8	Replace HVAC Phase II, Lighting & Ceilings		770,560			770,560	8
9	Replace HVAC Phase III, Lighting & Ceilings		950,920			950,920	9
10	Replace HVAC Phase IV, Lighting & Ceilings			421,520		421,520	10
11	047 Nursery Road Elementary						11
12	Replace HVAC Phase I, Lighting & Ceilings			2,586,637		2,586,637	12
13	Replace HVAC Phase II, Lighting & Ceilings				2,125,936	2,125,936	13
14	053 River Springs Elementary						14
16	Replace HVAC Phase II, Lighting & Ceilings	739,836				739,836	16
17	Replace HVAC Phase III, Lighting & Ceilings	878,840				878,840	17
18	045 Seven Oaks Elementary						18
19	Roof Replacement, Wings 500, 800 & PE Center	649,950				649,950	19
20	050 Chapin Intermediate						20
21	Roof Replacement Phase I, Original Bldg.		1,075,515			1,075,515	21
22	Roof Replacement, Phase II, Original Bldg.			1,075,515		1,075,515	22
23	Install Car Rider Extension Drive; Widen Entrance	174,891				174,891	23
24	054 Dutch Fork Middle						24
25	Replace HVAC Phase III, Lighting & Ceilings			1,415,008		1,415,008	25


A		B	C	D	E	F	G
		Proposed FY 2016-17	Proposed FY 2017-18	Proposed FY 2018-19	Proposed FY 2019-20	Proposed FY 2020-21	Total
Projected Revenue		10,000,000.00	10,000,000.00	10,000,000.00	10,000,000.00	10,000,000.00	50,000,000.00
26	040 Irmo Middle						
28	Replace HVAC Phase IV, Lighting & Ceilings			949,680			949,680
29	Replace Roof, Buildings R & M, Phase I					1,096,071	1,096,071
30	038 Chapin High						
31	Upgrade Drama Theater	0					0
32	051 Dutch Fork High						
33	Roof Replacement, Phase I, Original Bldg.			1,135,785			1,135,785
34	Roof Replacement, Phase II, Original Bldg.				1,135,785		1,135,785
35	Replace HVAC Phase V, Lighting & Ceilings		1,581,796				1,581,796
36	Upgrade Auditorium Lighting, Rigging & Audiovisual	427,500					427,500
37	039 Irmo High						
38	Roof Replacement, Activities		971,775				971,775
39	Roof Replacement, Adult Education		167,370				167,370
40	Replace HVAC Fresh Air Career Ctr.				525,318		525,318
41	Replace HVAC Ext Air Cooled I, Activities		410,120				410,120
42	Replace HVAC Ext Air Cooled II, Lighting & Ceilings			463,640			463,640
43	Replace HVAC Career Ctr., Lighting & Ceilings			476,000			476,000
44	Renovate Restrooms, West Wing	375,438					375,438
45	995 CATE Center						
46	Construct Barn	240,950					240,950
47	009 District						
48	Issuance Costs (includes interest expense)	65,000	65,000	65,000	65,000		260,000
49	Activity Bus Replacement	200,000	200,000	200,000	200,000		800,000
50	Safety & Security Equipment	133,930					133,930
51	School-Identified Needs	454,735	306,944	297,852	124,840	973,856	2,158,227
52	Contingency	1,035,000	500,000	500,000	500,000	500,000	3,035,000
53	Sub Total - Maintenance and New Initiatives	7,000,000	7,000,000	7,000,000	7,000,000	7,000,000	35,000,000
54							
55							
		Technology					
Technology Plan		3,000,000	3,000,000	3,000,000	3,000,000	3,000,000	15,000,000
Grand Total		10,000,000	10,000,000	10,000,000	10,000,000	10,000,000	50,000,000



MEMORANDUM

To: Members of the Board of Trustees

Through: Stephen Hefner, Ed.D.
Superintendent

From: A. Len Richardson 
Chief Financial Officer

Date: February 17, 2016

Re: Approval of Resolution for FY2017 Capital Budget

Attached is the Resolution authorizing the issuance and sale of a not exceeding \$10,000,000 general obligation bond, Series 2016, of School District No. 5 of Lexington County and Richland County, South Carolina, authorizing the South Carolina Association of Governmental Organizations (SCAGO) to facilitate the sale of the bond under its general obligation debt program; prescribing the terms and conditions under which the bond may be issued; authorizing the chair or vice chair of the Board of Trustees or the district superintendent of the school district to determine certain matters relating to the bonds; providing for the payment of the bonds and the disposition of the proceeds thereof; and other matters relating thereto.

RECOMMENDATION:

The administration recommends approval of the Resolution.

ALR:tl

Attachment

SCHOOL DISTRICT NO. 5 OF LEXINGTON COUNTY AND
RICHLAND COUNTY, SOUTH CAROLINA

A RESOLUTION

AUTHORIZING THE ISSUANCE AND SALE OF A NOT EXCEEDING \$10,000,000 GENERAL OBLIGATION BOND, SERIES 2016, OF SCHOOL DISTRICT NO. 5 OF LEXINGTON COUNTY AND RICHLAND COUNTY, SOUTH CAROLINA, AUTHORIZING THE SOUTH CAROLINA ASSOCIATION OF GOVERNMENTAL ORGANIZATIONS TO FACILITATE THE SALE OF THE BOND UNDER ITS GENERAL OBLIGATION DEBT PROGRAM; PRESCRIBING THE TERMS AND CONDITIONS UNDER WHICH THE BOND MAY BE ISSUED; AUTHORIZING THE CHAIR OR VICE CHAIR OF THE BOARD OF TRUSTEES OR THE DISTRICT SUPERINTENDENT OF THE SCHOOL DISTRICT TO DETERMINE CERTAIN MATTERS RELATING TO THE BONDS; PROVIDING FOR THE PAYMENT OF THE BONDS AND THE DISPOSITION OF THE PROCEEDS THEREOF; AND OTHER MATTERS RELATING THERETO.

Adopted: _____, 2016

BE IT RESOLVED, BY THE BOARD OF TRUSTEES OF SCHOOL DISTRICT NO. 5 OF LEXINGTON COUNTY AND RICHLAND COUNTY, SOUTH CAROLINA, AS FOLLOWS:

SECTION 1. Definitions. Unless the context shall clearly indicate some other meaning, the terms defined in this Section shall have, for all purposes of this Resolution, the meanings hereinafter specified, with the definitions equally applicable to both the singular and plural forms and vice versa. The term:

“Board” shall mean the Board of Trustees of School District No. 5 of Lexington County and Richland County, South Carolina.

“Bondholder” or the term “Holder” or any similar term shall mean the registered owner of the Bond.

“Bond” shall mean the principal amount of bonds authorized and issued pursuant to this Resolution.

“Bond Act” shall mean Title 59, Chapter 71, Article 1, and Section 11-27-50 of the Code of Laws of South Carolina, 1976, as amended.

“Books of Registry” shall mean the registration books maintained by the Registrar for the Bond in accordance with Section 6 hereof.

“Interest Payment Date” shall mean March 1, 2017, or such other date as the District Superintendent determines.

“IRC” shall mean the Internal Revenue Code of 1986, as amended.

“Paying Agent for the Bond” shall mean the School District, unless otherwise determined by the Superintendent.

“Paying Agent for the SCAGO Certificates” shall mean Wells Fargo Bank, N.A., in Atlanta, Georgia, unless otherwise determined by the Superintendent.

“Registrar for the Bond” shall mean the School District, unless otherwise determined by the Superintendent.

“Registrar for the SCAGO Certificates” shall mean Wells Fargo Bank, N.A., in Atlanta, Georgia, unless otherwise determined by the Superintendent.

“Resolution” shall mean this Resolution.

“SCAGO” shall mean the South Carolina Association of Governmental Organizations.

“SCAGO Certificates” shall mean certificates of participation evidencing undivided proportionate interests in the GO Debt of the participating school districts issued by SCAGO pursuant to the SCAGO Trust Agreement.

“SCAGO Trust Agreement” shall mean the Trust Agreement by and between SCAGO and Wells Fargo Bank, N.A., or such other bank named therein, as trustee, dated as of a date to be determined by the parties thereto pursuant to which the SCAGO Certificates will be issued.

“S.C. Code” shall mean the Code of Laws of South Carolina, 1976, as amended.

"School District" shall mean School District No. 5 of Lexington County and Richland County, South Carolina.

"School District Representative" shall mean the person or persons at the time designated to act on behalf of the School District in matters relating to the Bond as evidenced by a written certificate furnished to SCAGO and the trustee thereunder containing the specimen signature of such person or persons and signed on behalf of the School District by the Chair or Vice Chair of the Board or the District Superintendent. Such certificate may designate an alternate or alternates each of whom shall be entitled to perform all duties of the School District Representative.

"State" shall mean the State of South Carolina.

"Trustee" shall mean Wells Fargo Bank, N.A., or such other bank or trust company named by SCAGO.

SECTION 2. Findings and Determinations. The Board of the School District hereby finds and determines:

(a) The School District was organized by action of the Lexington County Board of Education in 1951 and the Richland County Board of Education in 1952. The School District is also known as Richland-Lexington School District No. 5. The Board is the governing body of the School District.

(b) Article X, Section 15, of the Constitution of the State of South Carolina, 1895, as amended (the "Constitution"), provides that after November 30, 1982, the governing body of any school district may incur general obligation debt in an amount not exceeding eight percent (8%) of the assessed value of all taxable property of such school district and upon such terms and conditions as the General Assembly may prescribe.

(c) The Bond Act provides that the board of trustees of any school district may issue general obligation bonds of such school district for the purpose of defraying the cost of "capital improvements" (as defined therein) to any amount not exceeding the constitutional debt limitation applicable to such school district. The Bond Act requires the county board of education wherein the school district is located, if there is such, to approve the issuance of such bonds.

(d) Section 11-27-50(2) of the Bond Act further provides that if an election be prescribed by the provisions of the Bond Act but is not required by the provisions of Article X of the Constitution, then in every such instance, no election need be held and the remaining provisions of the Bond Act shall constitute a full and complete authorization to issue bonds in accordance with such remaining provisions. Section 11-27-90 of the S.C. Code further provides that any school district of the State may issue bonds in fully registered form.

(e) The School District's Financial Advisor, Compass Municipal Advisors, LLC ("Compass") has advised the School District that SCAGO has been formed to facilitate one or more pooled borrowing programs including a pooled general obligation debt program (the "SCAGO GO Program") for school districts in the State. Each participating school district in the SCAGO GO Program will have its general obligation debt ("GO Debt") sold together with GO Debt issued by the other participating school districts in order to achieve a lower net interest cost and lower issuance costs associated with its GO Debt. Pursuant to the terms of the SCAGO GO Program, SCAGO will cause the execution and delivery of the SCAGO Certificates pursuant to the SCAGO Trust Agreement.

(f) The assessed value of all taxable property in the School District, for purposes of computation of the School District's constitutional debt limit, in Richland County as of June 30, 2015, is \$188,010,350 and in Lexington County as of June 30, 2015, is \$302,170,090 for a total of \$484,180,440. Eight percent (8%) of such sum is \$38,734,435. As of the date hereof, the School District has \$11,079,000 in outstanding general obligation debt subject to the limitation imposed by Article X, Section 14(6) of the Constitution. Thus, the School District may incur \$27,655,435 of general obligation debt within its applicable constitutional debt limitation. However, the Bonds authorized herein will not be issued until after March 2, 2016, at which time the School District will have no outstanding general obligation debt subject to the limitation imposed by Article X, Section 14(6) of the Constitution.

(g) Pursuant to Resolutions adopted by the Board of the School District on August 13, 2012, and January 12, 2016, respectively the School District has adopted Written Procedures related to Tax-Exempt Debt and Written Procedures related to Continuing Disclosure.

(h) It is in the best interest of the School District to participate in the SCAGO GO Program and to provide for the issuance and sale of the Bond of the School District pursuant to the aforesaid provisions of the Constitution and laws of the State of South Carolina in the principal amount of not to exceed \$10,000,000 for the purpose of providing funds to be applied for any of the following purposes: (i) to fund capital improvements; (ii) any other purposes permitted by the Bond Act; and (iii) paying costs of issuance of the Bond.

SECTION 3. Authorization and Details of Bond. Pursuant to the aforesaid provisions of the Constitution and laws of the State, there is hereby authorized to be issued a not exceeding \$10,000,000 general obligation bond (the "Bond") of the School District to obtain funds for any of the purposes mentioned in Section 2(h) above, including any financial and legal fees relating thereto and other incidental costs of issuing the Bond.

The Bond shall be issued as fully-registered Bond; shall be dated as of the date on which the Bond is delivered to the initial purchaser thereof or such other date as the District Superintendent determines; shall be in denominations of \$1,000 or any integral multiple thereof not exceeding the principal amount of the Bond maturing in each year unless issued as a single Bond in the entire principal amount of the issue; shall bear interest (calculated on the basis of a 360-day year comprised of twelve 30-day months) from their date payable on each Interest Payment Date at such rate or rates as may be determined at the time of the sale thereof by the District Superintendent; and shall mature on March 1, 2016 and in the respective principal amount as determined by the District Superintendent.

Both the principal of and interest on the Bond shall be payable in any coin or currency of the United States of America which is, at the time of payment, legal tender for public and private debts. Unless otherwise determined by the District Superintendent, the School District is hereby designated as the Registrar for the Bond and Paying Agent for the Bond.

SECTION 4. Redemption Provisions. The Bond shall not be subject to redemption prior to maturity.

SECTION 5. Authority to Determine Certain Matters. Without further authorization, the Board hereby delegates to the Superintendent the authority to: (a) determine the par amount of the Bond; (b) determine the original issue date of the Bond; (c) determine the Interest Payment Date and Principal Payment Date if different from that set forth herein; (d) designate a Paying Agent for the Bond and Registrar for the Bond if different from that set forth herein; (e) determine the date and time of sale of the Bond; (f) receive bids on behalf of the School District and award the sale of the Bond in accordance with the terms of the

Notice of Sale for the Bond; and (g) execute all other agreements, certificates and documents as may be necessary or required in connection with the issuance the Bond.

SECTION 6. Registration, Transfer and Exchange of Bond. The School District shall cause the Books of Registry to be kept at the offices of the Registrar for the Bond for the registration and transfer of the Bond. Upon presentation at its office for such purpose, the Registrar for the Bond shall register or transfer, or cause to be registered or transferred, on such Books of Registry, the Bond under such reasonable regulations as the Registrar for the Bond may prescribe.

The Bond shall be transferable only upon the Books of Registry of the School District, which shall be kept for such purpose at the principal office of the Registrar for the Bond, by the registered owner thereof in person or by his duly authorized attorney upon surrender thereof together with a written instrument of transfer satisfactory to the Registrar for the Bond duly executed by the registered owner or his duly authorized attorney. Upon the transfer of any such Bond, the Registrar for the Bond on behalf of the School District shall issue in the name of the transferee a new fully-registered Bond of the same aggregate principal amount, interest rate and maturity as the surrendered Bond. Any Bond surrendered in exchange for a new registered Bond pursuant to this Section shall be canceled by the Registrar for the Bond.

The School District, the Registrar for the Bond and the Paying Agent for the Bond may deem or treat the person in whose name any fully-registered Bond shall be registered upon the Books of Registry as the absolute owner of such Bond, whether such Bond shall be overdue or not, for the purpose of receiving payment of the principal of and interest on such Bond and for all other purposes; and all such payments so made to any such registered owner or upon his order and shall be valid and effectual to satisfy and discharge the liability upon such Bond to the extent of the sum or sums so paid, and neither the School District nor the Registrar for the Bond or the Paying Agent for the Bond shall be affected by any notice to the contrary. In all cases in which the privilege of transferring Bond is exercised, the School District shall execute and the Registrar for the Bond shall authenticate and deliver the Bond in accordance with the provisions of this Resolution. Neither the School District nor the Registrar for the Bond or the Paying Agent for the Bond shall be obliged to make any such transfer of the Bond during the fifteen (15) days preceding the maturity date on such Bond.

SECTION 7. Form of Bond. The Bond shall be substantially in the form attached hereto as Exhibit A and incorporated herein by reference, subject to such changes, additions or deletions as may be approved by the Chair or Vice Chair of the Board or the District Superintendent.

SECTION 8. Execution and Delivery of the Bond. The Bond shall be executed in the name of the School District with the manual or facsimile signature of the Chair or Vice Chair of the Board attested by the manual or facsimile signature of the Secretary of the Board under the seal of the School District which shall be impressed, imprinted or reproduced thereon. The Bond shall not be valid or become obligatory for any purpose unless there shall have been endorsed thereon a certificate of authentication. The Bond shall bear a certificate of authentication manually executed by the Registrar for the Bond in substantially the form set forth herein.

The School District Representatives are further authorized and directed to deliver the Bond upon the terms and conditions provided herein and under the SCAGO GO Program, to receive or cause to be received the proceeds of the sale of the Bond, to execute and deliver such certificates and other closing documents and take such other action as may be necessary or appropriate in order to effectuate the proper issuance, sale and delivery of the Bond.

Each participating school district in the SCAGO GO Program will be the issuer of its GO Debt and undivided proportionate interests therein will be evidenced by the SCAGO Certificates executed and

delivered under the SCAGO Trust Agreement. The Board approves and consents to the assignment and pledge of the Bond under the provisions of the SCAGO Trust Agreement and approves the execution and delivery by trustee of the SCAGO Certificates upon payment of the purchase price thereof, all as contemplated by the SCAGO GO Program.

SECTION 9. Sale of Bond; Form of Notice of Sale. The Bond shall be sold at public sale, after advertisement of the sale in a newspaper having general circulation in the State or, as determined by the District Superintendent, upon advice of Compass, in a financial publication published in the City of New York or, in the discretion of the District Superintendent, in both publications. As authorized by Section 11-27-50(7)(b) of the S.C. Code the advertisement must appear not less than seven (7) days prior to the date set as a sale date for such sale.

The Notice of Sale shall be in substantially the form set forth as Exhibit B.

SECTION 10. Deposit and Use of Proceeds. (a) Upon the purchase and delivery of the GO Debt, the proceeds shall be deposited with the Lexington County Treasurer (the "County Treasurer") in a special fund to the credit of the School District and may be used to make the Acquisition Payments and to pay the costs of issuance of the Bond. The portion of the proceeds of the Bond to be applied to costs of issuance may be paid as determined by a School District Representative.

(b) The proceeds derived from the sale of the GO Debt shall be deposited with the County Treasurer in a special fund to the credit of the School District and shall be applied solely to the purposes for which the GO Debt has been issued, including payment of costs of issuance or at the direction of the County Treasurer, the proceeds derived from the sale of the GO Debt, less costs of issuance, shall be deposited into an acquisition fund in the name of School District No. 5 of Lexington County and Richland County, South Carolina to be known as the "School District No. 5 of Lexington County and Richland County, South Carolina, General Obligation Bond, Series 2016, Acquisition Fund" (the "Acquisition Fund"), which shall be established under the SCAGO Trust Agreement. The School District may withdraw amounts from the Acquisition Fund on the date of delivery of the GO Debt and thereafter on any business day. "Business Day" shall mean any day except Saturday, Sunday or a holiday.

(c) The costs of issuance of the Bonds shall, at the direction of the County Treasurer, be deposited in the Costs of Issuance Account of the Expense Fund created pursuant to the SCAGO Trust Agreement or may be paid as determined by a School District Representative. Any remaining proceeds shall be applied for any purposes authorized by the Bond Act.

(d) Disbursements from the Acquisition Fund and the Expense Fund (as defined in the SCAGO Trust Agreement) shall be made upon the written order of a School District Representative or the County Treasurer, as designated on the appropriate form solely for the purpose for which the GO Debt was issued.

SECTION 11. Security. The full faith, credit, resources and taxing power of the School District are hereby irrevocably pledged for the payment of the principal and interest on the Bond as they respectively mature and for the creation of such sinking fund as may be necessary therefor. There shall be levied annually by the Auditors of Lexington County and Richland County (the "County Auditors") and collected by the County Treasurer and the Richland County Treasurer in the same manner as county taxes are levied and collected, a tax, without limit, on all taxable property in the School District sufficient to pay the principal and interest of the Bond as they respectively mature and to create such sinking fund as may be necessary therefor.

The County Auditors and County Treasurers shall be notified as to the delivery of and payment

for the Bond and are hereby directed to levy and collect, respectively, on all taxable property in the School District, a tax, without limit, on all taxable property in the School District sufficient to pay the principal and interest of the Bond as they respectively mature and to create such sinking fund as may be necessary therefor.

SECTION 12. Sinking Fund; Payment of Bond. The School District covenants that it will deposit or cause to be deposited into the applicable sinking fund, and the County Treasurers are hereby authorized and directed to deposit or cause to be deposited into such sinking fund, payments relating to the Bond on or before their respective maturity dates. The County Treasurers, on behalf of the School District and at the written direction of a School District Representative, shall transfer or cause to be transferred from time to time any moneys then on deposit in the sinking fund to the trustee under the SCAGO Trust Agreement.

SECTION 13. Federal Tax Covenants. The School District hereby covenants and agrees with the holders of the Bond that it will not take any action which will, or fail to take any action which failure will, cause interest on the Bond to become includable in the gross income of the bondholders thereof for federal income tax purposes pursuant to the provisions of the IRC and the regulations promulgated thereunder in effect on the date of original issuance of the Bond and that no use of the proceeds of the Bond shall be made which, if such use had been reasonably expected on the date of issue of the Bond would have caused the Bond to be an "arbitrage bond" as defined in the IRC and to that end the School District shall:

- (a) comply with the applicable provisions of Section 103 and Sections 141 through 150 of the IRC so long as the Bond is outstanding;
- (b) establish such funds, make such calculations and pay such amounts, in the manner and at the times required in order to comply with the requirements of the IRC relating to required arbitrage rebate of certain amounts to the United States; and
- (c) make such reports of information at the time and places required by the IRC.

SECTION 14. Exemption from State Taxes. Both the principal of and interest on the Bond shall in accordance with the provisions of Section 12250 of the S.C. Code be exempt from all State, county, municipal, school district, and all other taxes or assessments, except estate or other transfer taxes, direct or indirect, general or special, whether imposed for the purpose of general revenue or otherwise.

SECTION 15. Events of Default. The School District agrees that each of the following events may be considered an "Event of Default" under the SCAGO Trust Agreement:

- (a) If default shall be made in the due and punctual payment of principal of or any interest on the Bond, including failure to make when due a sinking fund payment under Section 12 of this Resolution; or
- (b) If the School District shall default in the performance of any covenant, agreement or condition on its part to be performed under the Bond or this Resolution other than a default in payment, and such default shall continue for a period of 30 days after written notice thereof is received by the School District.

SECTION 16. Remedies. The School District agrees that each of the following may be included as remedy for an "Event of Default" under the SCAGO Trust Agreement:

(a) In any case of an Event of Default, the trustee under the SCAGO Trust Agreement may take such action or actions for the enforcement of the rights of the owners as due diligence, prudence and care would require and to pursue the same with like diligence, prudence and care, including commencement of an action for mandamus or other appropriate action to require the School District to comply with the terms of this Resolution.

(b) If the School District shall fail or refuse to make any required deposit on the relevant sinking fund payment date in order to make the transfer to its applicable Sinking Fund Account, the trustee under the SCAGO Trust Agreement, shall take such action as is necessary to invoke the provisions of Section 59-71-155 of the S.C. Code regarding transfers from the State general fund to make payments on bonded indebtedness of South Carolina school districts; and upon being indemnified against cost and expense, exercise any remedy at law or in equity for the benefit of the owners of the SCAGO Certificates, and shall disburse all funds so collected to the holders of the SCAGO Certificates or assignee of the Bond.

SECTION 17. SCAGO. The School District hereby authorizes SCAGO to facilitate the sale of the Bond together with other GO Debt issued by other participating school districts in the SCAGO GO Program as determined by SCAGO.

SECTION 18. Acknowledgement of SCAGO Certificates; Registered Owner; Limitation of Liability. The School District, by participating in the SCAGO GO Program, recognizes the rights of the owners of the SCAGO Certificates, acting directly or through the trustee under the SCAGO Trust Agreement, to enforce the obligations and covenants contained in the Bond and this Resolution; provided that in no event shall the School District be liable for any obligations, covenants or damages except those which arise out of the Bond authorized by this Resolution, and, in particular, the School District shall not be liable for any obligations, liabilities, acts or omissions of SCAGO or any other participating school district in the SCAGO GO Program.

SECTION 19. Discharge of Resolution. If the School District shall pay or cause to be paid, or there shall otherwise be paid, to the owner or owners of a SCAGO Certificate, the total principal and interest due or to become due thereon through maturity (as determined in accordance with the Trust Agreement), in the manner stipulated therein and in this Resolution, then the pledge of the full faith, credit and taxing power of the School District under this Resolution, and all covenants, agreements and other obligations of the School District hereunder, shall thereupon cease, terminate and become void and be discharged and satisfied with respect to the Bond for which such payment was made.

SECTION 21. Filings with Central Repository. In compliance with Section 11-1-85 of the S.C. Code, the School District covenants that it will file or cause to be filed with a central repository for further availability in the secondary bond market when requested: (a) a copy of the annual audit of the School District within thirty (30) days of the School District's receipt thereof; and (b) within thirty (30) days of the occurrence thereof, relevant information of an event which, in the opinion of the School District, adversely affects more than five percent (5%) of the School District's revenue or its tax base.

SECTION 22. Declaration of Intent to Reimburse Certain Expenditures. This Resolution shall constitute the School District's declaration of official intent pursuant to Regulation §1.150-2 of the IRC to reimburse the School District from a portion of the proceeds of the Bond for expenditures it anticipates incurring (the "Expenditures") with respect to the projects set forth in Section 2(g) hereof prior to the issuance of the Bond. The Expenditures which are reimbursed are limited to Expenditures which are: (a) properly chargeable to a capital account (or would be so chargeable with a proper election or with the application of the definition of placed in service under Regulation §1.150-2 of the IRC) under general federal income tax principals; or (2) certain de minimis or preliminary Expenditures satisfying the

requirements of Regulation §1.150-2(f) of the IRC. The source of funds for the Expenditures with respect to these projects will be the School District's reserve funds. To be eligible for reimbursement of the Expenditures, the reimbursement allocation must be made not later than 18 months after the later of (a) the date on which the Expenditures were paid; or (b) the date such projects were placed in service, but in no event more than three (3) years after the original Expenditures.

SECTION 23. Authorization. The Chair of the Board, the Vice Chair of the Board, the Secretary of the Board, the District Superintendent and the Chief Financial Officer of the School District, are fully empowered and authorized to take such further action and to execute and deliver such additional documents and certificates as may be necessary to effect the issuance of the Bond. The District Superintendent is hereby authorized to retain the McNair Law Firm, P.A., as bond counsel, and Compass Municipal Advisors, LLC, as Financial Advisor, with respect to the issuance of the Bond. The Superintendent is authorized to execute such contracts, documents or engagement letters as may be necessary and appropriate to effectuate these engagements.

SECTION 24. Repeal of Conflicting Resolutions. All rules, policies, regulations, resolutions and parts thereof, procedural or otherwise, in conflict herewith or the proceedings authorizing the issuance of the Bond is, to the extent of such conflict, hereby repealed, and this Resolution shall take effect and be in full force from and after its adoption.

Adopted this ____ day of _____, 2016.

SCHOOL DISTRICT NO. 5 OF LEXINGTON
COUNTY AND RICHLAND COUNTY,
SOUTH CAROLINA

Chair, Board of Trustees

(SEAL)

ATTEST:

Secretary, Board of Trustees

EXHIBIT A

FORM OF BOND

UNITED STATES OF AMERICA
STATE OF SOUTH CAROLINA
SCHOOL DISTRICT NO. 5 OF LEXINGTON COUNTY AND RICHLAND COUNTY
GENERAL OBLIGATION BOND, SERIES _____

No. R-1

INTEREST RATE MATURITY DATE ORIGINAL ISSUE DATE CUSIP

PRINCIPAL AMOUNT:

REGISTERED HOLDER: South Carolina Association of Governmental Organizations

KNOW ALL MEN BY THESE PRESENTS, that the School District identified above (the "School District"), is justly indebted and, for value received, hereby promises to pay to the registered holder named above, or registered assigns, the principal amount shown above on the maturity date shown above and to pay interest on such principal sum from the date hereof at the interest rate per annum shown above until this Bond matures. Interest on this Bond is payable at maturity, and shall be payable by check or draft mailed to the person in whose name this Bond is registered on the registration books of the School District maintained by the registrar, presently the School District (the "Registrar"), at the close of business on the fifteenth (15th) day of the calendar month next preceding each Payment Date. The principal and interest on this Bond are payable in any coin or currency of the United States of America which is, at the time of payment, legal tender for public and private debts; provided, however, that interest on this fully registered Bond shall be paid by check, draft or transfer of funds.

This Bond shall not be entitled to any benefit under the Resolution of the School District authorizing this Bond (the "Resolution"), nor become valid or obligatory for any purpose, until the Certificate of Authentication hereon shall have been duly executed by the Registrar.

For the payment of the principal and interest on this Bond as they respectively mature and for the creation of such sinking fund as may be necessary therefor the full faith, credit, resources and taxing power of the School District are hereby irrevocably pledged, and there shall be levied annually by the Auditors of the Counties in which the School District is located (the "Counties") and collected by the Treasurers of the Counties, in the same manner as county taxes are levied and collected, a tax, without limit, on all taxable property in the School District sufficient to pay the principal and interest of this Bond as they respectively mature and to create such sinking fund as may be necessary therefor.

This Bond is issued pursuant to and in accordance with the Constitution and laws of the State of South Carolina, including Article X, Section 15 of the Constitution of the State of South Carolina, 1895, as amended; Title 59, Chapter 71, Article 1, Code of Laws of South Carolina, 1976, as amended; Title 11, Chapter 27, Code of Laws of South Carolina, 1976, as amended; and the Resolution.

This Bond is not subject to redemption prior to maturity.

Except for the initial assignment of this Bond to the Trustee under the SCAGO Trust Agreement (as defined in the Resolution), this Bond is transferable, only upon the books of the School District kept

for that purpose at the principal office of the Registrar by the registered holder in person or by his duly authorized attorney upon surrender of this Bond together with a written instrument of transfer satisfactory to the Registrar duly executed by the registered holder or his duly authorized attorney. Thereupon a new fully registered Bond of the same aggregate principal amount, interest rate, and maturity shall be issued to the transferee in exchange therefor as provided in the Resolution. The School District, the Registrar and the Paying Agent may deem and treat the person in whose name this Bond is registered as the absolute owner hereof for the purpose of receiving payment of or on account of the principal hereof and interest due hereon and for all other purposes.

Under the laws of the State of South Carolina, this Bond and the interest hereon are exempt from all State, county, municipal, school district and other taxes or assessments, except estate or other transfer taxes, direct or indirect, general or special, whether imposed for the purpose of general revenue or otherwise.

It is hereby certified and recited that all acts, conditions and things required by the Constitution and laws of the State of South Carolina to exist, to happen and to be performed precedent to or in the issuance of this Bond exist, have happened and have been performed in regular and due time, form and manner as required by law; that the amount of this Bond, together with all other indebtedness of the School District does not exceed the applicable limitation of indebtedness under the laws of the State of South Carolina; and, that provision has been made for the levy and collection of a tax, without limit, on all taxable property in the School District sufficient to pay the principal and interest of this Bond as they respectively mature and to create such sinking fund as may be necessary therefor.

IN WITNESS WHEREOF, the aforesaid School District has caused this Bond to be signed with the manual or facsimile signature of the Chair of the Board of Trustees of the School District, attested by the manual or facsimile signature of the Secretary of the Board of Trustees of the School District and the seal of the School District impressed, imprinted or reproduced hereon.

SCHOOL DISTRICT NO. 5 OF LEXINGTON
COUNTY AND RICHLAND COUNTY,
SOUTH CAROLINA

Chair, Board of Trustees

(SEAL)

ATTEST:

Secretary, Board of Trustees

REGISTRAR'S CERTIFICATE OF AUTHENTICATION

Date of Authentication:

This Bond is the bond described in the within mentioned Resolution of School District No. 5 of Lexington County and Richland County, South Carolina.

School District No. 5 of Lexington County and Richland County, South Carolina, as Registrar

By: _____
Authorized Officer

The following abbreviations, when used in the inscription on the face of this Bond, shall be construed as though they were written out in full according to applicable laws or regulations.

TEN COM as tenants in common

UNIF GIFT MIN ACT

TEN NET as tenants by the
entireties

____ Custodian _____
(Cust) (Minor)
under Uniform Gifts to
Minors Act _____
(state)

JT TEN as joint tenants with
right of survivorship
and not as tenants in
common

Additional abbreviations may also be used though not in above list.

EXHIBIT B

FORM OF SUMMARY NOTICE OF SALE

NOTICE IS HEREBY GIVEN that each of the following school districts (the "School Districts") shall offer collectively for public sale its general obligation bond (collectively, the "Bonds") in the amounts indicated on _____, _____, 2016.

[PRINCIPAL AMOUNTS AND NAMES OF
PARTICIPATING SCHOOL DISTRICTS]

The Bonds will be collectively sold as the South Carolina Association of Governmental Organizations Certificates of Participation, Series 2016__ (Evidencing Undivided Proportionate Interests in General Obligation Debt of Certain South Carolina School Districts).

Sale Date:	_____, 2016
Sale Time:	11:00 a.m., South Carolina time
Bonds Dated:	_____, 2016
Interest Payment:	March 1, 2017
Maturity:	March 1, 2017
Redemption provisions:	The Bonds are not subject to redemption.
Book-Entry-Only:	The Bonds will be book-entry-only.
Legal Opinion:	McNair Law Firm, P.A., Columbia, South Carolina
Financial Advisor:	Compass Municipal Advisors, LLC, Columbia, South Carolina

Proposals will be received by Compass Municipal Advisors, LLC on behalf of the South Carolina Association of Governmental Organizations and the School Districts. The Bonds will be issued in book-entry only form in the denomination of \$5,000 or any integral multiple thereof. A copy of the Preliminary Offering Circular in deemed final form and the Official Terms and Conditions of Sale are available via the internet at <https://officialstatements.swst.com/>.

For additional information, please contact the School Districts' Bond Counsel, Francenia B. Heizer, Esquire, McNair Law Firm, P.A., telephone (803) 799-9800; e-mail: fheizer@mcnair.net or the School Districts' financial advisor, Brian G. Nurick, Compass Municipal Advisors, LLC, telephone: (859) 368-9616, e-mail: brian.nurick@compassmuni.com.


*Preliminary, subject to change.



Memorandum

To: Members of the Board of Trustees

Through: Dr. Stephen W. Hefner
Superintendent

From: Mark A. Bounds 
Chief Information Officer

Date: February 22, 2016

Re: Proposed Board Meeting Schedule for 2016-2017

Attached is the proposed schedule for 2016-17 School District Five of Lexington and Richland Counties Board of Trustees meetings. The meeting schedule alternates between clusters to ensure board meetings are accessible to citizens throughout the community. The Center for Advanced Technical Studies will host board meetings during summer vacation to help alleviate the burden of hosting board meetings when school is not in session.

We have not received any concerns about the proposed schedule since it was discussed at the February 8, 2016 Board meeting.

The proposed Board meeting schedule for 2016-2017 is submitted for approval.

Thank you and please let me know if you have any questions.

MAB

Attachment - Proposed Board Meeting Schedule for 2016-2017

Proposed Board Meeting Calendar
2016-17

July 18, 2016	Center for Advanced Technical Studies
August 8, 2016	Center for Advanced Technical Studies
September 12, 2016	Dutch Fork ES
September 26, 2016	Ballentine ES
October 10, 2016	Irmo MS
October 24, 2016	Dutch Fork MS
November 14, 2016	Spring Hill HS
December 12, 2016	Leaphart ES
January 9, 2017	Dutch Fork HS
January 23, 2017	Lake Murray ES
February 13, 2017	Seven Oaks ES
February 27, 2017	Oak Pointe ES
March 13, 2017	Chapin ES
March 27, 2017	Irmo HS
April 24, 2017	CrossRoads IS
May 8, 2017	Chapin MS
May 22, 2017	Nursery Road ES
June 12, 2017	Center for Advanced Technical Studies
June 26, 2017	Center for Advanced Technical Studies



MEMORANDUM

TO: Members of the Board of Trustees
Stephen Hefner, Ed.D., Superintendent

FROM: Christina Melton, Ed.D. *cm*
Chief Instructional Officer

Date: February 16, 2016

Re: February 22, 2016 Board Meeting, Approval Item
Textbook Adoptions FY 2015-2016 Recommendations

After a careful review of all state adopted textbooks, the textbook adoption committees, composed of parents, teachers, and subject area coordinators are bringing the attached textbook recommendations for School District Five to you for your approval:

- Computer Applications, 7-8
- Integrated Business Applications, 9-12
- Social Studies, K-2 and 4-5
- Social Studies, Grade 3
- AP Human Geography, Grade 9
- Civics, Grade 10
- US Government, Grade 12, CP/Honors
- US Government, AP, Grade 12

CATE Assistant Director, Dr. Al Gates, Social Studies Coordinator, Melony Sanford, and Textbook Coordinator, Dr. Robin Cox will be present to answer any questions you may have regarding these adoptions.

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Computer Applications

Title: Century 21: Digital Information Management

Publisher: National Geographic Learning (Cengage)

ISBN: 978-1-111-57140-5

Grade level/Cluster: 7-8

Author: Hoggatt, J.P.; Shank, J. A.; Smith, J.R.

Copyright Date: 2015

I. Organization

Text provides basic instruction in computer applications including basic computer skills, basic word processing skills, basic spreadsheet skills, basic data base skills, and basic presentation skills. The text is divided into units, lessons, and sub-lessons. Each sub lesson begins with learning objectives and ends with a quick check to assess student understanding of the objectives. Each lesson ends with a comprehensive review of the objectives of the sub-lessons in that lesson. Vocabulary words are bolded and reviewed at the end of each sub-lesson, lesson, and unit. Each sub-lesson includes activities designed to help students develop practical skills (e.g., writing business letters, addressing envelopes, merging data into word documents.)

II. Content

The text provides explanations of the importance of each concept or skill to be learned. The text provides easily followed step by step instructions for each skill. These step by step instructions are followed by activities that require students to use the newly developed skills in a similar but new exercise. The text provides more challenging activities at the end of each unit.

III. Style

Illustrations are primarily designed to provide students with stepwise development of a product. The final product is presented in black type and the processes that students follow to develop the product are in blue type. The text includes screen shots from Microsoft Office 2013 and illustrations of persons of different ethnicities and both genders using a computer. The reading level is appropriate from middle school students (8th grade reading level, 1070 Lexile, 230 RIT.)

IV. Illustrations

The text depicts persons of different ethnicities and both genders using computers. The text includes tables, charts, and graphs used primarily to illustrate the final products that students will develop as they learn each program. Most of the illustrations are pictures of the finished product as described in the preceding paragraph.

V. Instructional Supplements

Supplements are limited but include data files for students to use in skill development.

Sub-Committee Chairperson *RMC* Date 1/22/2016
Donna Bowman (CMS)
Antoinette Langley (IMS)
Jill Beuk (DFMS)
Dr. Al Gates (Assistant Director)



Adopted 4/28/86; Revised 1/28/2013

School District Five of Lexington & Richland Counties
Recommendation Instructional Materials Adoption

Subject: Integrated Business Applications
Title: Microsoft Office 2013: Introductory
Publisher: National Geographic Learning (Cengage)
ISBN: 9781285166032

Grade level/Cluster: 9-12
Author: Misty E. Vermaat
Copyright Date: 2014

I. Organization

Text provides basic and advanced instruction on Microsoft Office programs (Word, Excel, PowerPoint, and Access) and an introduction to the Microsoft Outlook e-mail program. The text includes "Consider This" boxes which ask students to extend the activities and develop unique solutions to problems. The text includes in-chapter and end-of-chapter exercises. The text includes web and cloud based applications of MS Office.

II. Content

The text provides step by step and screen by screen instructions for each MS Office program. Exercises include each menu item (File, Home, Insert, etc.) and how the item is used in the development of a program file (Word document, Excel Sheet, Access Database.)

III. Style

The text is colorful and full of illustrations, primarily screen shots of what students will see on the computer as they work their way through each exercise. The reading level is a little difficult for high school students due to the highly technical nature of the text; however, screen shots assist students in understanding. Many students will be able to complete the exercises by simply following the screen shots.

IV. Illustrations

The text is very colorful, with appropriate pictures of individuals using computers. The text includes tables, charts, and graphs used primarily to illustrate the final products that students will develop as they learn each program. Most of the illustrations are screen shots.

V. Instructional Supplements

Supplements include a teacher and student resource pack providing files for use while learning each program.

Sub-Committee Chairperson Date 1/19/2016
Sherry Stone (SHHS)
Gail Gallman (DFHS)
Carolyn Diaz (IHS)
Brantley Brinkley (CHS)
Angela McGregor (IHS)
Dr. Al Gates (Assistant Director)




Adopted 4/28/86; Revised 1/28/2013

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Social Studies Grade level/Cluster: K-2, 4-5
Title: South Carolina Social Studies Author: Banks, Colleary, et al.
Publisher: McGraw Hill Copyright Date: 2014

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. The text facilitates the correlation with other disciplines such as reading, writing, math, and science.
- B. The text is adaptable to a variety of teaching techniques (Direct Instruction, questioning, essential questions, and making connections) and individual needs (differentiated lesson options, leveled readers, foldables, and academic vocabulary).
- C. Skill development is sequential and clearly defined. There are various levels of reading and comprehension levels.
- D. The format is consistent and includes logical titles, bold subheadings, and suggested reading.
- E. The table of contents, indexes, and glossary are easy for students to use and understand.

II. Content

- A. The content of the text is closely aligned with state standards.
- B. The content is current with updated material.
- C. The chapters and units contain several student checks for understanding.
- D. The text is suitable for the interests and needs of the intended group. Differentiation is available throughout the text.
- E. The text follows a logical sequence.

III. Style

- A. The reading level is appropriate for the designated group.
- B. The text is colorful and attractive, and the binding is suitable for daily use.
- C. The activities meet student interests and ability levels. The activities are differentiated.
- D. The vocabulary is historical and content appropriate.
- E. The student directions are clear and easy for students to follow.

IV. Illustrations

- A. All graphics are clear, aligned with the content, and correctly labeled.
- B. The pictorial representations extend and enrich the content. They provide real world examples to help students connect the learning.
- C. The charts and diagrams are teacher and student friendly.
- D. There are a variety of ethnic groups accurately represented throughout the text.
- E. Illustrations are accurate and portray historical events.

V. Instructional Supplements

- A. Practice exercises are embedded in the student text.
- B. There are several suggestions for additional reading opportunities.
- C. The program includes a teacher guide, online component, student workbook, and leveled readers.
- D. There are a variety of instructional strategies and techniques provided such as active teaching ideas, comprehension questions, rubrics, videos, and activity cards.
- E. The online supplemental materials are helpful and easy to use.

Committee Chairperson Meloy Davis

Date 2.1.16

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: 3rd Grade Social Studies Grade level/Cluster: 3rd Grade
Title: The South Carolina Story Author: Thomas, Greaves, et al.
Publisher: Gibbs Smith Education Copyright Date: 2014

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. The text facilitates correlation with other disciplines such as ELA.
- B. The text is adaptable to a variety of teaching techniques and includes historical thinking activities for students.
- C. The text follows sequential skill development in each chapter and lesson.
- D. The format is consistent throughout the text with big questions at the start of each chapter, titles for each chapter and lesson, and subheadings in each lesson.
- E. The table of contents is easy to follow as well as the Let's Begin section and the indexes.

II. Content

- A. The text directly correlates to the South Carolina 3rd grade Social Studies standards.
- B. The text includes accurate historical information and is up to date with the standards.
- C. There are numerous student checks for understanding throughout each lesson.
- D. The text follows a logical chronological sequence.
- E. The text is readily adaptable to differing instructional levels.

III. Style

- A. The reading level is appropriate for 3rd grade students.
- B. The text is visually easy to read and has a durable binding.
- C. The activities included in the text are appropriate for 3rd grade students.
- D. The vocabulary and paragraphs are appropriate for the intended audience.
- E. The text includes clear step by step directions for students that are easy to follow.

IV. Illustrations

- A. The images included in the text are attractive and properly labeled. Each image also includes a clear explanation for students.
- B. The pictorial representations extend and enrich the content by including critical thinking questions for students to analyze the images.
- C. The text includes numerous visually appealing charts, diagrams, and maps that are easy to read.
- D. There are numerous primary sources included which allow for additional reading.
- E. The depiction of ethnic and gender groups are adequate and appropriate.

V. Instructional Supplements

- A. There is an online platform which provides additional student and teacher resources.
- B. The student guide included provides additional practice activities for students.
- C. Activities for student needs and abilities are appropriate in the textbook and supplemental student guide.
- D. There are materials and activities available such as primary sources which provide informational text for ELA.
- E. The teacher's guide includes additional suggestions for effective instructional strategies and techniques.

Committee Chairperson Melony Safo
RMC

Date 2.1.16

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: A.P. Human Geography Grade level/Cluster: 9th Grade

Title: The Cultural Landscape: An Introduction to Human Geography Author: Rubenstein

Publisher: Pearson Copyright Date: 2014

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. The text facilitates correlation with other disciplines such as ELA and Science.
- B. The text is adaptable to provide varied teaching techniques and address individual learning needs.
- C. There is a sequential skill development for each chapter beginning with a detailed introduction to the chapter, pause and reflect questions, and check-ins.
- D. The format for each chapter is consistent with clear chapter titles, key issue titles, and subtitles included in each key issue section.
- E. The text is logically laid out with clear table of contents, indexes, and appendices which help facilitate an organized retrieval of information.

II. Content

- A. The text includes a detailed A.P. Human Geography correlation guide.
- B. The content is accurate and provides current real world examples for students.
- C. The text facilitates the evaluation of student progress with pause and reflect questions throughout each key issue section.
- D. A logical sequence is evident.
- E. The text is suitable for the needs of A.P. Human Geography students.

III. Style

- A. The reading level is appropriate for the intended A.P. level.
- B. The text is visually appealing and has a durable binding.
- C. The activities included provide real world examples that students can relate to.
- D. The vocabulary and sentence structure are appropriate for an A.P. level text.
- E. The text provides numerous positive gender and multi-cultural portrayals.

IV. Illustrations

- A. The pictorial representations are properly labeled and attractive.
- B. The pictorial representations included enrich the content from the written text.
- C. There are numerous charts, diagrams, and maps that include clear keys.
- D. The representation of ethnic and gender groupings are adequate and appropriate.
- E. The text includes an overwhelming number of detailed maps for each key issue.

V. Instructional Supplements

- A. There are practice exercises included for the A.P. Human Geography exam such as the A.P. test prep workbooks which include entire practice exams.
- B. There are numerous resources provided for teachers such as PowerPoint presentations, test bank questions, and a comprehensive instructor resource manual.
- C. The text program has an online platform for teachers and students which include online homework, tutorials, and a comprehensive assessment system.
- D. The instructor resource manual provides effective instructional strategies such as icebreakers and comprehension activities.
- E. The Mastering Geography platform provides teachers the capability to assign additional activities, and students the ability to participate in focused study review activities.

Committee Chairperson Meloy Safel
RMC

Date 2.1.16

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Civics Grade level/Cluster: 10th Grade
Title: Building Citizenship: Civics and Economics Author: Remy, Patrick, Saffell, and Clayton
Publisher: McGraw-Hill Copyright Date: 2016

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. The text is a strong multi-disciplinary text.
- B. The technology resources provide a variety of activities for diverse learners.
- C. The skill development of the text is logically defined.
- D. The sequence is logical and easy to follow.
- E. The table of contents is logical and provides illustrations and visuals.

II. Content

- A. The text correlates to curriculum and objectives.
- B. The content is current.
- C. The teacher's edition provides numerous strategies to assess student learning.
- D. The text and illustrations are suitable for the intended audience and will provoke discussion.
- E. The sequence is logical and in chronological order.

III. Style

- A. The text has a more appropriate Lexile level for the intended learners.
- B. The text is attractive and had a durable binding.
- C. There is a wide range of activities included such as visual, skill-building, and critical thinking and writing.
- D. The vocabulary, sentence structure, and paragraphs are appropriate.
- E. The student directions are clear and concise.

IV. Illustrations

- A. Pictorial representations are abundant and interesting.
- B. Pictorial representations will stimulate and extend discussions.
- C. The charts and diagrams included are colorful and easily read by students.
- D. There are many suggestions for additional reading.
- E. The representations of ethnic and gender groupings are more than adequate.

V. Instructional Supplements

- A. The practice and application activities including the online resources are excellent.
- B. The activities for diverse student needs and abilities are excellent.
- C. The materials and activities for cross-curricular application are abundant.
- D. There are excellent guides, handbooks, and keys provided.
- E. There are a wide range of instructional strategies and techniques available for teachers.

Committee Chairperson Melony Dargatzis

Date 1.28.16

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: United States Government Grade level/Cluster: 12th Grade CP/Honors
Title: United States Government: Our Democracy Author: Remy, Ritchie, et al.
Publisher: McGraw-Hill Copyright Date: 2016

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. The text facilitates correlation with previous social studies courses and connects with other disciplines.
- B. The text allows for various methods to differentiate instruction and is adaptable to individual needs.
- C. The text format is logical and sequential.
- D. The titles and headings throughout the text are logical and easy to follow.
- E. Appendices for this text thoroughly cover additional historical documents, and the table of contents is well organized and contains essential questions.

II. Content

- A. The text correlates to South Carolina state standards for U.S. Government.
- B. The content is up to date with the latest elections and policies.
- C. Each section begins with essential questions and provides numerous checks for student understanding.
- D. The text provides positive portrayals of genders and ethnicities.
- E. The information is presented in a logical sequence and is adaptable to different levels of learning.

III. Style

- A. The reading level is appropriate for both CP and Honors classes. The reading level is adaptable through the online platform.
- B. The textbook is durable and includes colorful and appealing images.
- C. The activities provided for students are varied according to topic and provide different methods for learning.
- D. The text structure and vocabulary are appropriate.

E. Students are able to follow instructions as provided by prompts given at the beginning, during, and end of each lesson.

IV. Illustrations

- A. The charts, graphs, and images are attractive and well labeled.
- B. The charts and images enhance the content, and the units are well balanced because of the images.
- C. The charts, graphs, and images are clearly labeled and are complimentary to the material.
- D. There are suggestions for additional reading included in the teacher's edition.
- E. A variety of ethnic groups and genders are represented in a variety of leadership roles.

V. Instructional Supplements

- A. There are multiple online resources available for students and teachers.
- B. There are numerous instructional manuals provided to complement each unit.
- C. Additional student activities are provided throughout each unit
- D. The teacher edition is complete with resources, differentiated activities, and suggested resources.
- E. There are multiple technological resources provided and suggested for each lesson and unit.

Committee Chairperson Melony Sanfo *rmc*

Date 1.28.16

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: United States Government and Politics Advanced Placement Grade level/Cluster: 12th
Title: Government in America Author: Edwards and Wattenburg
Publisher: Pearson Copyright Date: 2016

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. The text is organized in accordance with the units taught in A.P. Government.
- B. The text is adaptable for a variety of teaching strategies.
- C. The skill development is sequential with very well labeled sections and subsections.
- D. The format is consistent and easy to follow throughout the text.
- E. The table of contents, indexes, and appendices are easy to follow for teachers and students.

II. Content

- A. The text covers all required A.P. Government material and an A.P. Government correlation is provided at the front of the book.
- B. The text is accurate and updated to include recent political information.
- C. The text provides multiple opportunities for student evaluation within each unit.
- D. The text allows for different instructional levels and interactive participation.
- E. The text highlights current political issues and different cultural aspects.

III. Style

- A. The Lexile level and format are appropriate for A.P. students.
- B. The text is well written, and the binding is durable.
- C. The activities such as "You be the Judge" pique students' interest and appeal to modern day students.
- D. The subsection tabs make sections easily identifiable.
- E. The sentence and paragraph structure are inviting, and the vocabulary is highlighted and included in the margin as well as in the index.

IV. Illustrations

- A. The illustrations are clearly labeled and easy to understand.
- B. There are a variety of charts, diagrams, and tables for student analysis.
- C. Complex information is explained through the visuals that are included in the text.
- D. Suggestions for additional reading are provided at the end of each chapter.
- E. The illustrations represent multiple cultures and gender groups.

V. Instructional Supplements

- A. There is an A.P. test prep book provided for each student which includes practice questions, chapter overviews, and study outlines.
- B. The text includes current websites listed for each unit.
- C. Students and teachers have access to online resources in the My Poli Sci Lab online platform.
- D. There are quality student assessments included for each chapter as well as entire A.P. practice exams.
- E. The activities included for students are appropriate for A.P. level students.

Committee Chairperson Melody J. [Signature]

Date 2-1-16

Adopted 4/28/86; Revised 6/3/96



MEMORANDUM

TO: Members of the Board of Trustees
Stephen Hefner, Ed.D., Superintendent

FROM: Christina Melton, Ed.D. *cm*
Chief Instructional Officer

Date: February 16, 2016

Re: February 22, 2016 Board Meeting, Discussion Item
Textbook Adoptions FY 2016-2017 Recommendations

After a careful review of all state adopted textbooks, the textbook adoption committees, composed of parents, teachers, and subject area coordinators are bringing the attached textbook recommendations for School District Five to you for your approval:

- Law Related Education, 9-12
- AP European History, 10-12
- Physical Education, 9-12
- Elementary Science, K-5
- Elementary Science (FOSS), 1-5
- Elementary Science, Grade 3
- Elementary and Middle School Science (Gizmos), 3-8
- Middle School Science (FOSS), 6 & 8
- Middle School Science (TWIG), 6-8
- Middle School Science, Grade 7
- Biology 1 CP, 9-12
- Biology 1 Honors, 9-12
- IB Biology, 11 & 12
- AP Biology, 10-12
- Middle School Science (CP and Honors), 6-8

Dr. Robin Cox, Textbook Coordinator, Melony Sanford, Social Studies Coordinator and Beth Boland, Science, PE and Health Coordinator will be present to answer any questions you may have regarding these adoptions.

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Law Related Education Grade level/Cluster: 9-12
Title: Street Law: A Course in Practical Law Author: Arbetman and O'Brien
Publisher: McGraw-Hill Copyright Date: 2016

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. The text makes great connections with Economics, Government, History, and Sociology.
- B. The text allows for a variety of teaching strategies from lecture to group activities to the research of important court cases.
- C. Each unit begins with an outline of skills students will learn, and they are clear for students.
- D. The progression from units to chapters is consistent throughout the text.
- E. The organization of the table of contents, indexes, and appendices help students achieve academic success.

II. Content

- A. The objectives and standards are clear and apply to student learning.
- B. All content is current and up to date.
- C. Various activities are included to result in successful student mastery.
- D. The activities included are great for sparking student interest.
- E. The content follows a logical sequence.

III. Style

- A. The reading level is appropriate for the designated group.
- B. The book has an attractive cover and a sturdy binding.
- C. The activities are varied to meet a diverse group of students.
- D. The vocabulary and sentence structure are appropriate.
- E. The text provides clear directions for students that are easy for them to understand.

IV. Illustrations

- A. The pictorial representations are appropriate and clearly labeled.
- B. The charts, maps, and graphs included help to engage students in the content.
- C. The visual images are inclusive to a wide range of ethnic groups.
- D. The pictorial images enhance learning by including questions for student analysis.
- E. The representation of gender groupings is excellent.

V. Instructional Supplements

- A. The practice exercises and skill development are more than sufficient.
- B. All materials needed for evaluation of student progress is included.
- C. There are effective instructional strategies and activities included for teachers and students.
- D. There are authentic assessments included for students.
- E. There is an extensive online platform with additional teacher and student resources.

Committee Chairperson

Melory Delfino
rwc

Date

2.4.16

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: A.P. European History Grade level/Cluster: 10-12
Title: Western Civilization Author: Spielvogel
Publisher: Cengage Learning Copyright Date: 2016

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. The text facilitates correlation with other disciplines such as art and literature.
- B. The text follows the A.P. concept sequence for A.P. European History.
- C. The skills are developed through supplementary materials and at the end of each chapter.
- D. The format is laid out in chronological order.
- E. The table of contents offers subtopics as well as subheadings within each chapter.

II. Content

- A. The text correlates to the newly redesigned A.P. European History course.
- B. The content is thorough, current, and historically accurate.
- C. Student progress can be tracked through sample tests and questions throughout the text.
- D. The text includes conflicting viewpoints of historical events which provides an opportunity for student analysis.
- E. The text includes practice A.P. review questions at the end of each chapter.

III. Style

- A. The reading level is appropriate for the intended audience.
- B. The text is attractive and has a durable binding.
- C. The activities included help to prepare students for the A.P. exam.
- D. The vocabulary is appropriate and includes a pronunciation key.
- E. The student directions are clear and concise.

IV. Illustrations

- A. The illustration and pictures are attractive, labeled, and appropriate.
- B. The pictures, maps, and charts help to enrich the content and classroom instruction.
- C. There are an abundance of effective charts, diagrams, and maps.
- D. Ethnic and gender groups are equally represented.
- E. The pictures, maps, and charts include questions for student analysis.

Instructional Supplements

- A. There are practice A.P. tests provided.
- B. The activities help to provide students with good test-taking skills.
- C. There is a teacher's resource guide included and a student A.P. preparation workbook.
- D. The materials and activities provided align with the themes and concepts of this A.P. course.
- E. There are technological resources provided which include a resource CD and an online website.

Committee Chairperson Melany Dafford

Date 2.4.16

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Physical Education Grade level/Cluster: 9-12
Title: Fitness For Life, 6th Edition Author: Corbin & Le Masurier
Publisher: Human Kinetics Copyright Date: 2014

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. Text provides correlation with the science behind fitness, health and wellness as well as the incorporation fitness technology, psychology and mathematics.
- B. Text provides various teaching strategies and allows for extensions beyond teacher-directed activities.
- C. Text is arranged sequentially beginning with foundations of health and fitness and scaffolding to healthy choices leading to lifelong wellness.
- D. Each unit has an opener that provides a content overview for each unit.
- E. Table of contents, index, and glossary are easy to use and facilitate learning.

II. Content

- A. The text correlates with the 2014 SC Academic Standards for Physical Education.
- B. Content is up-to-date and accurate, the "trends and technology" feature provides information on current health topics and is updated monthly.
- C. Self-assessment, lesson review, chapter review, and test bank software is provided.
- D. The text provides positive age, gender, and ethnic portrayals.
- E. The text is adaptable to differing instructional levels.

III. Style

- A. The reading level is appropriate for the high school student.
- B. The text is attractive and the binding durable.
- C. Exercises are scaffolded for students of all ability levels.
- D. Vocabulary is highlighted and subheadings chunk reading.
- E. Directions for students are concise and easy to follow.

IV. Illustrations

- A. Anatomical and exercise diagrams are properly labeled and easy to interpret.
- B. Pictorial representations support fitness instruction.
- C. Web topics extend and enrich lessons.
- D. Additional opportunities for reading about current health topics are provided.
- E. Representation of gender and ethnic groups is adequate and appropriate.

V. Instructional Supplements

- A. Standards correlation document is provided.
- B. Tools are provided to align instruction and assessment such as student portfolios.
- C. Online virtual vocabulary cards.
- D. Multiple instructional videos are provided for each chapter.
- E. Assignments and activities are downloadable, editable, and fillable so that students can submit work electronically if desired.

Committee Chairperson 

Date 2/13/2010

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Elementary Science Grade level/Cluster: K-5
Title: Interactive Science Author: Buckley, et al.
Publisher: Pearson Copyright Date: 2017

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. Text facilitates correlations with other disciplines such as reading, art, writing, and math.
- B. Text is adaptable to a variety of teaching techniques.
- C. Skill development is sequential and clearly defined/Various levels of reading and comprehension.
- D. Performance indicators and science and engineering practice are included at the beginning of each chapter.
- E. Table of contents, indexes, and appendices are student-friendly and easy to follow.

II. Content

- A. Text correlates to standards and essential questions are listed.
- B. Content is current and accurate with realistic examples.
- C. Text facilitates the evaluation of student progress/Activities embedded to reinforce concepts.
- D. STEM connections.
- E. Quick labs are aligned with content standards.

III. Style

- A. Reading level is appropriate for designated group/Essential vocabulary is highlighted.
- B. Text is attractive in appearance and has a durable binding.
- C. Student directions are clear and appropriate for each grade level.
- D. Activities are differentiated/STEM and DOK activities for extended learning.
- E. Text facilitates the evaluation of student progress in several ways.

IV. Illustrations

- A. Pictorial representation are properly labeled/Vocabulary cards include illustrations.
- B. Real world images are included to help students connect to the learning.
- C. Diverse ethnic groups are represented throughout.
- D. Charts, diagrams and maps are abundant and easy to read.
- E. Pictorial representations extend and enrich the content learning.

V. Instructional Supplements

- A. Leveled readers are aligned with the standards.
- B. Great on-line resources for students to view videos and labs.
- C. Assessments are aligned with standards.
- D. STEM activity book has great resources for notebooking.
- E. Teacher edition includes scope and sequence for all grade levels.

Committee Chairperson


E. Palmer

Date

2/13/2014

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Elementary Science Grade level/Cluster: 1st-5th
Title: FOSS/DSM Author: n/a
Publisher: School Specialty Copyright Date: varies

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. Kit-based: Consumable materials for explorations and experiments.
- B. Text is adaptable to a variety of teaching techniques and individual needs.
- C. Skill development is sequential and clearly defined.
- D. Format is consistent and logical with titles, subheadings, appropriate cross-referencing.
- E. Table of contents, indices, and appendices facilitate learning.

II. Content

- A. 1st Grade: FOSS Plants and Animals and Sound and Light.
- B. 2nd Grade: FOSS Insects and Plants (NG) and Balance and Motion, 3rd Edition.
- C. 3rd Grade: DSM Food Chains and Webs.
- D. 4th Grade: FOSS Sun, Moon and Planets, 3rd Edition, Weather and Earth and DSM Sound.
- E. 5th Grade: DSM Earth Processes.

III. Style

- A. Reading level is appropriate for designated groups.
- B. Text is attractive, new binding on teacher guide provides an easily manageable and durable resource.
- C. Activities meet student interest and are engaging.
- D. Vocabulary, sentence structure and paragraphs are appropriate.
- E. Student directions are concise and understandable.

IV. Illustrations

- A. Pictorial representations are properly labeled, attractive and easily interpreted .
- B. Pictorial representation extend and enrich the content ,
- C. Charts, diagrams and maps are abundant and easily read .
- D. Suggestions provided for additional reading .
- E. _____

V. Instructional Supplements

- A. Technological resources are easily accessible and useful.
- B. Technological resources are student-friendly .
- C. Consumable resources are appealing and engaging for students .
- D. Practice exercises are sufficient ,
- E. Activities for students are varied and meet the 2014 Science Standards and SEPs .

Committee Chairperson



Date

2/13/2014

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Elementary Science Grade level/Cluster: 3
Title: Building Blocks of Science: Matter Author: n/a
Publisher: Carolina Biological Copyright Date: 2014

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. Kit-based: Consumable materials for explorations and experiments .
- B. Text is adaptable to a variety of teaching techniques and individual needs .
- C. Skill development is sequential and clearly defined .
- D. Format is consistent and logical with titles, subheadings, appropriate cross-referencing .
- E. Table of contents, indices, and appendices facilitate learning .

II. Content

- A. Text and inquiry-based activities correlate to the 2014 Science Standards and incorporated 2014 SEPs .
- B. Content is current and accurate .
- C. Program facilitates the evaluation of student progress .
- D. Text component is suitable to the interests and needs of the 3rd grade learner .
- E. A logical sequence is evident .

III. Style

- A. Reading level is appropriate for designated groups .
- B. Attractive text and durable binding .
- C. Activities meet student interest and are engaging .
- D. Vocabulary, sentence structure and paragraphs are appropriate .
- E. Student directions are concise and easy to understand .

IV. Illustrations

- A. Pictorial representations are attractive.
- B. Charts, tables and graphs are easy for students to read .
- C. _____
- D. _____
- E. _____

V. Instructional Supplements

- A. Quality supplementary materials.
- B. Assessment materials included .
- C. Manual is provided for teachers.
- D. Technology resources are sufficient .
- E. Incorporation of 2014 SEPs.

Committee Chairperson  E. Bullock

Date 2/13/2014

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Elementary and Middle School Science Grade level/Cluster: 3-8
Title: Gizmos Author: N/A
Publisher: Explore Learning, LLC Copyright Date: 2016

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. Gizmos is a supplemental science resource that provides the opportunity for on-line simulations.
- B. Skill development is sequential and clearly defined.
- C. Easy-to-use search features.
- D. _____
- E. _____

II. Content

- A. South Carolina edition, grades 3,4,5,6, 7, and 8.
- B. Virtual labs.
- C. Variety of experiences that enhance interactive participation.
- D. Problem solving situations are realistic and relevant.
- E. _____

III. Style

- A. Reading level is appropriate.
- B. The activities meet student's interests and ability levels.
- C. Student directions are easy to understand.
- D. _____
- E. _____

IV. Illustrations

- A. Pictures and representations are properly labeled, attractive, and easy-to-read.
- B. Pictorial representations extend and enrich the content.
- C. Representation of ethnic and gender groups are adequate and appropriate.
- D. _____
- E. _____

V. Instructional Supplements

- A. Teacher guides, handbooks, or manuals are provided for each lab.
- B. Exercises and activities facilitate content learning.
- C. Labs are appropriate for a variety of student learning needs.
- D. Assessments are authentic and related to standards.
- E. _____

Committee Chairperson

E. Board *pvu*

Date

2/12/2014

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Middle School Science Grade level/Cluster: 6, 8
Title: FOSS/DSM Author: N/A
Publisher: School Specialty Copyright Date: Varies

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

A. Supplemental kits for inquiry-based labs with emphasis on the 2014 Science and Engineering Practices.

B. Skill development is sequential.

C. _____

D. _____

E. _____

II. Content

A. 6th Grade: FOSS-Diversity of Life.

B. 7th Grade: DSM-From Genes to Proteins, FOSS-Populations and Ecosystems.

C. _____

D. _____

E. _____

III. Style

A. Reading level is appropriate.

B. Activities meet student interests and ability levels.

C. _____

D. _____

E. _____

IV. Illustrations

A. Illustrations are abundant and properly labeled.

B. A variety of charts and diagrams are provided,

C. _____

D. _____

E. _____

V. Instructional Supplements

A. Teacher handbook provided,

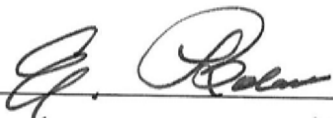
B. Activities are correlated to the 2014 Science Standards.

C. Emphasis on 2014 Science and Engineering Practices.

D. _____

E. _____

Committee Chairperson



Date

2/13/2016

Adopted 4/28/86; Revised 6/3/96

RWC

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Middle School Science Grade level/Cluster: 6, 7, 8
Title: STC/TWIG Author: N/A
Publisher: Carolina Biological Copyright Date: Varies

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

A. Supplemental kits for inquiry-based labs with emphasis on the 2014 Science and Engineering Practices .

B. TWIG is a supplemental on-line resource for videos and related learning materials .

C. _____

D. _____

E. _____

II. Content

A. 6th Grade: STC-Experimenting with Forces and Motion, Understanding Weather & Climate, Working with Motors and Simple Machines, TWIG .

B. 7th Grade: Investigating Biodiversity and Interdependence, Studying the Development and Reproduction of Organisms, Experimenting with Mixtures, Compounds and Elements, Exploring Respiration and Circulation, Exploring Properties of Matter, Investigating Digestion and Motion, TWIG.

C. 8th Grade: Electricity, Waves and Information Transfer, Experimenting with Force and Motion, Exploring Planetary Systems, Exploring Plate Tectonics, TWIG .

D. _____

E. _____

III. Style

A. Easy to read and follow.

B. Activities are at the appropriate student level.

C. TWIG provides current and interesting video resources including inquiry and extension questions.

D. _____

E. _____

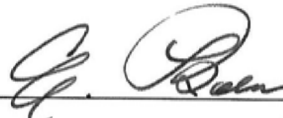
IV. Illustrations

- A. Illustrations are attractive and provide helpful interpretations.
- B. Charts and diagrams are user friendly.
- C. Student guide book has excellent illustrations.
- D. _____
- E. _____

V. Instructional Supplements

- A. Assessments are integrated and appropriate.
- B. Activities correlate to the subject area and student needs.
- C. Useful strategies are provided.
- D. Resources to aid instruction are provided.
- E. _____

Committee Chairperson


RWC

Date

2/13/2010

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Middle School Science Grade level/Cluster: 7
Title: Active Science Author: N/A
Publisher: Activate Learning Copyright Date: 2013

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

A. Supplemental kits for inquiry-based activities emphasizing the 2014 Science and Engineering Practices.

- B. _____
- C. _____
- D. _____
- E. _____

II. Content

A. 7th Grade: Where Have All the Creatures Gone? Why Do Organisms Look the Way They Do?

- B. _____
- C. _____
- D. _____
- E. _____

III. Style

A. Activities meet student interest and are engaging.

- B. _____
- C. _____
- D. _____
- E. _____

IV. Illustrations

- A. Illustrations provide real world examples.
- B. Diagrams and charts are relevant to content.
- C. _____
- D. _____
- E. _____

V. Instructional Supplements

- A. Units provide supplemental reading segments.
- B. Guides and manuals are provided.
- C. Relevant activities for students.
- D. Incorporates content aligned with the 2014 Science and Engineering Practices.
- E. _____

Committee Chairperson 

Date 2/13/2010

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Biology 1, College Preparatory Grade level/Cluster: 9-12
Title: Biology (Glencoe Science) Author: Biggs, et al.
Publisher: McGraw Hill Copyright Date: 2012

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. Supports interdisciplinary collaboration, some STEM connections.
- B. Text meets a variety of teaching techniques and the needs of individual students.
- C. Skill development is sequential and provides scaffolding.
- D. Titles, subtitles and referencing are clear, the format is consistent throughout text.
- E. Table of contents clear and appendices have good resources.

II. Content

- A. Supports and correlates with 2014 SC Science Standards and Science and Engineering Practices
- B. Content is current, accurate, and appealing to students.
- C. Learning checkpoints are available and includes formative and summative assessments.
- D. Standardized test questions are provided.
- E. Reading essentials are provided for struggling readers.

III. Style

- A. Each unit is started with a foldable, reading level is appropriate for college preparatory students.
- B. Text is attractive with a visually appealing layout, durable binding.
- C. Provides enrichment to meet varying abilities.
- D. Vocabulary is clearly indicated, language is appropriate.
- E. Directions facilitate learning.

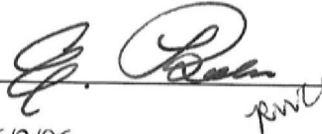
IV. Illustrations

- A. Pictures, representations, charts, diagrams and maps enhance and enrich content.
- B. Representations of ethnic groups are appropriate and adequate.
- C. Illustration invite inquiry,
- D. Graphics are of high quality.
- E. References provided to ConnectED (online resources) .

V. Instructional Supplements

- A. An interactive reader is provided.
- B. Lab notebook correlates to textbook.
- C. Online materials are available .
- D. Science notebook provides good practice opportunities .
- E. Suggestions for scaffolding and differentiating instruction .

Committee Chairperson



Date

2/13/2014

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Biology 1, Honors Grade level/Cluster: 9-12
Title: Biology Author: Miller and Levine
Publisher: Pearson Copyright Date: 2017

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. Strong correlations with reading & writing/Math skills in each chapter/Connections to STEM.
- B. Very adaptable for differentiated instruction based on reading level and past preparation.
- C. Sequence of the text mirrors State standards with SEP and STEM connections.
- D. Formatting is clear and understandable, easy to follow.
- E. Appendices are useful with ancillary instructional support.

II. Content

- A. Correlations to 2014 Science Standards and SEPs are highlighted in each chapter.
- B. The content is current to include biotechnology.
- C. Self-assessments and SC standards practice questions at the end of every chapter.
- D. Case studies and mysteries are provided at the beginning of every chapter.
- E. A variety of experiences and problem-based scenarios allow for adaptation to differing instructional levels.

III. Style

- A. Reading level is appropriate for the honors level student.
- B. Text is attractive and the binding appears durable.
- C. Enrichment activities provided to meet varying abilities.
- D. Directions are concise and easily understood.
- E. Vocabulary, sentence structure and paragraph format are appropriate for honors level students.

IV. Illustrations

- A. Pictures are properly labeled and easily interpreted.
- B. Illustrations, charts, diagrams, maps and other media are abundant.
- C. Ethnic groups are adequately and appropriately represented.
- D. Gender groups are adequately and appropriately represented.
- E. Suggestions for supplemental readings and activities are provided.

V. Instructional Supplements

- A. Practice questions and chapter assessments are sufficient.
- B. Supplemental products are provided and useful to extend content.
- C. Materials and activities are provided to correlate with other subject areas.
- D. Technology resources are integrated within each chapter of study.
- E. Authentic student assessment based on standards as part of instruction is provided.

Committee Chairperson



Date

2/13/2010

Adopted 4/28/86; Revised 6/3/96

RWC

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: International Baccalaureate Biology Grade level/Cluster: 11-12
Title: Higher Level Biology 2nd Edition Author: Damon, et al.
Publisher: Pearson Copyright Date: 2014

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. Text includes correlations to statistics, extended essay, etc.
- B. Multiple teaching strategies are supported.
- C. Skill development is sequential and matches IB standards.
- D. Format is easy to follow.
- E. Excellent appendices.

II. Content

- A. Text is written exactly to meet IB standards.
- B. Content is current and accurate.
- C. Multiple options for student evaluation are available.
- D. The test is interesting and provides international components.
- E. The sequence is logical and follows the layout of the standards.

III. Style

- A. The reading level is appropriate for a college level text.
- B. The text is attractive with a paperback binding.
- C. Activities are appropriate, provide interest, and support the standards.
- D. The vocabulary and layout are appropriate and easy to follow.
- E. Student directions are easy to follow and match the standard requirements.

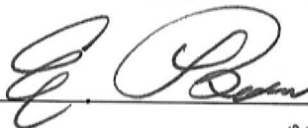
IV. Illustrations

- A. Pictures are appropriate, correct and easy to read.
- B. Illustrations help to further understanding of content.
- C. Charts are abundant and labeled properly.
- D. Suggestions for further reading are available.
- E. Ethnic groups are represented but not prevalent.

V. Instructional Supplements

- A. Practice exercises are available throughout each chapter and at the end of each chapter.
- B. Activities help to support the standards and increase student interest and engagement.
- C. Guides and keys are available.
- D. The book is a correlation guide to the standards.
- E. Multiple lab activities and a question database are provided.

Committee Chairperson


RWC

Date

2/6/2014

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Biology, Advanced Placement Grade level/Cluster: 10-12
Title: Biology in Focus Author: Urry, et al.
Publisher: Pearson Copyright Date: 2017

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. Text offers many correlations with statistics, biotechnology and career pathways .
- B. Adaptable to a great variety of teaching techniques and student needs .
- C. Correlates with the big ideas and essential knowledge in the AP curriculum.
- D. Titles, subtitles, and headings are easy to follow/Material is in manageable chunks.
- E. Index provides chapter and section correlation to big ideas and essential understanding.

II. Content

- A. The text is written precisely to address AP Biology standards.
- B. Content is very current and even includes clustered regularly interspaced short palindromic repeat.
- C. Text includes multiple avenues for assessment such as test bank, self quizzes and online resources.
- D. Text meets the needs of AP Biology students.
- E. Sequencing is logical and orderly.

III. Style

- A. The Lexile level of this book is 1300 and appropriate for a college-level course.
- B. The cover is appealing, overall size is manageable, durable cover and binding.
- C. The paragraphs are appropriate in length, very readable, with content vocabulary highlighted.
- D. Activities are appropriate.
- E. Student directions are easy to follow .


IV. Illustrations

- A. Illustrations are bold, colorful and easy to interpret.
- B. Pictorial representations add clarity and support the content.
- C. Charts and diagrams are abundant.
- D. Suggestions for additional reading are provided.
- E. Representation of ethnic groups is adequate.

V. Instructional Supplements

- A. Online materials are excellent with practices quizzes, animations and virtual labs.
- B. Activities are appropriate and reinforce the important concepts.
- C. Guides, manuals and keys are available online.
- D. Correlation guides for AP Biology standards are available.
- E. Instructional strategies and techniques are available (Inquiry and Practicing Biology workbooks).

Committee Chairperson



Date

2/13/2014

Adopted 4/28/86; Revised 6/3/96

School District Five of Lexington & Richland Counties

Recommendation Instructional Materials Adoption

Subject: Middle School Science (CP and Honors) Grade level/Cluster: 6, 7, 8
Title: Pearson Interactive Science Author: Buckley, et al.
Publisher: Pearson Education, Inc. (Prentice Hall) Copyright Date: 2017

Comments should reflect the criteria indicated on the appraisal form.

I. Organization

- A. Math activities are throughout text/ELA with writing/STEM connections.
- B. RTI under "Evaluate" headings/Differentiated instruction/Labs/Inquiry-based activities.
- C. Clear summary of learning/Closing chapter questions.
- D. Understandable organizational patterns/Format very clear.
- E. Good glossary, Spanish glossary, index, science skills practice.

II. Content

- A. Each lesson has performance standard indicators and a logical sequence.
- B. Information is current and accurate/Content reflects 2014 science standards.
- C. Evaluation relates to current standards and objectives/Pre-assessment and post-assessment.
- D. Adaptable to different instructional levels.
- E. Relevant/Real world connections.

III. Style

- A. Appropriate Lexile.
- B. Pages are appealing to the middle-level learner with spacing, text size, illustrations etc.
- C. Activities are engaging and meet student interests.
- D. Content vocabulary is highlighted/Sentence and paragraph structure appropriate.
- E. Directions are concise, step-by-step and clear.

IV. Illustrations

- A. Excellent graphics with clear explanations .
- B. Illustrations provide opportunity for interaction .
- C. Every lesson provides charts, diagrams or maps .
- D. Suggestions for additional reading provided in teacher edition ,
- E. Multiple ethnic groups represented/Global perspectives offered .

V. Instructional Supplements

- A. Online support is available/Chapters can be downloaded to electronic devices .
- B. Downloaded chapters include read aloud component .
- C. Video support for each unit.
- D. Examview text generator with the option of importing into All In Learning.
- E. Virtual labs .

Committee Chairperson



Date

2/13/2016

Adopted 4/28/86; Revised 6/3/96



Memorandum

To: Members of the Board of Trustees

Through: Dr. Stephen W. Hefner
Superintendent

From: Dr. Allison Jacques *Allison Jacques, Ph.D.*
Chief Human Resources Officer

Date: February 17, 2016

Re: Board Policies – Section G

Issue: Proposed revisions to Board Policies – Section G

Background: Attached for your consideration are the recommended revisions for the following policies:

- GDJ - "Support Staff Assignments and Transfers"
- GDJ-R – "Support Staff Assignments and Transfers"

Recommendation: Administration recommends that the proposed revisions to selected "G" policies proceed to First Reading approval.

AJ/aw

Attachments - GDJ - Current Board Policy/Recommended Policy – Section G
GDJ-R – Current Board Policy/Recommended Policy – Section G

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES**G - PERSONNEL****Policy GDJ Support Staff Assignments and Transfers****Policy GDJ Support Staff Assignments and Transfers**

Issued 2/10

Purpose: To establish the basic structure for the assignment and transfer of support staff in the district.

Assignment

All personnel are employed by the district, not a particular school.

The basic consideration in the assignment of support personnel in the schools is the well-being of the instructional program. The appropriateness of the assignments for individuals will have a significant impact on the morale of the staff and on the effectiveness of the total educational program. Support personnel, therefore, will be assigned on the basis of their qualifications, the needs of the district and the expressed desires of the individuals affected.

The superintendent or his/her designee is authorized to reassign all personnel in the best interest of the district.

Transfer

Personnel transfers within the district may be affected on a voluntary or involuntary basis. Voluntary transfer occurs as a result of an individual's request for assignment to another school. Involuntary transfer may be required when a school's enrollment changes, programs are eliminated, modified or added, or a school opens or closes.

With regard to both voluntary and involuntary transfers, personnel will be assigned first in accordance with the needs of the school district, second where the administration believes that the employee is best qualified to serve, and third as to the expressed preference of the employee. All other considerations being equal, the preferences of employees will be granted in order of their seniority in the district subject to the approval of the principals involved. Seniority will be determined by length of continuous service in Lexington School District Five. Academic or long-term disability leave will not be construed as an interruption of continuous service; however, this leave time will not be included in the calculation of length of service to the district.

Adopted 9/25/06; Revised 2/22/10

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES

Recommended Revisions – February 22, 2016 - Discussion

Policy

SUPPORT STAFF ASSIGNMENTS AND TRANSFERS

Code **GDJ** Issued _____

Purpose: To establish the basic structure for the assignment and transfer of support staff in the District.

Assignment/Reassignment

All personnel are employed by the district, not a particular school.

The basic consideration in the assignment of support personnel in the schools is the well-being of the instructional program. The appropriateness of the assignments for individuals will have a significant impact on the morale of the staff and on the effectiveness of the total educational program. ~~Support personnel, therefore, will be assigned on the basis of their qualifications, the needs of the District and the expressed desires of the individuals affected.~~

The Superintendent or his/her designee is authorized to reassign all personnel in the best interest of the District.

Transfer

An employee who wishes to be considered for a lateral transfer to a new location must submit a transfer request form to the District's Human Resources Office. Requests for transfers will be handled in accordance with administrative rule GDJ-R.

~~Personnel transfers within the District may be affected on a voluntary or involuntary basis. Voluntary transfer occurs as a result of an individual's request for assignment to another school. Involuntary transfer may be required when a school's enrollment changes, programs are eliminated, modified or added, or a school opens or closes.~~

~~With regard to both voluntary and involuntary transfers, personnel will be assigned first in accordance with the needs of the School District, second where the administration believes that the employee is best qualified to serve, and third as to the expressed preference of the employee. All other considerations being equal, the preferences of employees will be granted in order of their seniority in the District subject to the approval of the principals involved. Seniority will be determined by length of continuous service in Lexington School District Five. Academic or long-term disability leave will not be construed as an interruption of continuous service; however, this leave time will not be included in the calculation of length of service to the District.~~

Adopted 9/25/06; Revised 2/22/10, ____/15

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES

G - PERSONNEL

Policy GDJ Support Staff Assignments and Transfers

AR GDJ-R Support Staff Assignments and Transfers

AR GDJ-R Support Staff Assignments and Transfers

Issued 2/10

Personnel transfers within the district may be affected on a voluntary or involuntary basis. The superintendent or his/her designee may make personnel assignments within the district on a voluntary or involuntary basis. The district will use the following procedures in making assignments.

Voluntary transfer

Voluntary transfer occurs as a result of an individual's request for assignment to another school. Whenever vacancies develop in new or existing positions, consideration will be given to qualified applicants among current staff members. If an employee would like to be considered for a lateral transfer, the following procedure will be used.

- The person desiring a transfer for the next academic year must discuss it with his/her principal/director (if in a school) or with his/her immediate supervisor (if on the district level).
- The person must then complete a request for transfer form. Request for transfer forms are issued in January with a deadline for submission to the chief human resource services officer.

When a vacancy for which the person qualifies exists in the school to which the transfer is requested, the person's name will be referred to the principal who will schedule an interview with him/her. Transfer requests will not be made after May 15 in order to ensure stability in school staff for the coming year.

Based upon the recommendation of the site supervisor (and/or other immediate supervisors involved), the normal hiring process will occur.

Involuntary transfer/reassignment

Involuntary transfers may be required when a school's enrollment changes, programs are eliminated, modified or added, or a school opens or closes. If, in the opinion of the superintendent, an involuntary transfer would be in the best interest of the district, the following procedure(s) will be used.

- The superintendent or his/her designee will discuss the need for the reassignment with the employee's current site supervisor and with the site supervisor of the position and/or school to which reassignment is being contemplated and the qualifications possessed by a person filling the vacancy.
- The superintendent or his/her designee will then discuss with the employee to be transferred the reasons why the transfer is being considered. If, after the conference, the superintendent continues to believe that the transfer should go forward, the employee will be so notified in writing. Refusal to comply with the reassignment may be grounds for dismissal.

In the event that student enrollment increases or programs are replaced or reinstated for the next academic year at a school from which a person was involuntarily transferred, he/she will be given priority consideration if he/she wishes to return to the original school. In that case, the person will follow procedures as specified for request for transfer.

Transfers will not be used as a means of disciplinary action. Transfers for promotion may be exempt

from this policy.

Issued 9/25/06; Revised 2/22/10

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES

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Recommended Revisions – February 22, 2016 - Discussion

Administrative Rule

SUPPORT STAFF ASSIGNMENTS AND TRANSFERS

Code **GDJ-R** Issued _____

~~Personnel transfers within the District may be affected on a voluntary or involuntary basis.~~ The Superintendent or his/her designee may make personnel assignments within the District on a voluntary or involuntary basis. The District will use the following procedures in making assignments.

Reassignment

If, in the opinion of the Superintendent, a reassignment would be in the best interests of the District, the Superintendent or his/her designee will advise the employee of the reassignment and confirm the reassignment in writing to the employee. Refusal to comply with the reassignment may be grounds for dismissal.

Requests for Transfer

Voluntary transfer

~~Voluntary transfer occurs as a result of an individual's request for assignment to another school. Whenever vacancies develop in new or existing positions, consideration will be given to qualified applicants among current staff members.~~ If an employee would like to be considered for a lateral transfer, the following procedure will be used.

- The person desiring a transfer for the next academic year must discuss it with his/her principal/director (if in a school) or with his/her immediate supervisor (if on the District level).
- The person must then complete a request for transfer form. Request for transfer forms are issued in January with a deadline for submission to the Chief Human Resources Officer.

When a vacancy for which the person qualifies exists in the school to which the transfer is requested, the person's name will be referred to the principal who will schedule an interview with him/her. Transfer requests will not be made after May 31 in order to ensure stability in school staff for the coming year.

Based upon the recommendation of the site supervisor (and/or other immediate supervisors involved), the normal hiring process will occur.

If a position becomes available after the deadline date, and if it is in the judgment of the Superintendent or his/her designee that a requested position transfer is in the best interest of the

PAGE 2 – GDJ-R – SUPPORT STAFF ASSIGNMENTS AND TRANSFERS

District, such transfer may be made.

Involuntary transfer/reassignment

~~Involuntary transfers may be required when a school's enrollment changes, programs are eliminated, modified or added, or a school opens or closes. If, in the opinion of the Superintendent, an involuntary transfer would be in the best interest of the District, the following procedure(s) will be used.——~~

- ~~• The Superintendent or his/her designee will discuss the need for the reassignment with the employee's current site supervisor and with the site supervisor of the position and/or school to which reassignment is being contemplated and the qualifications possessed by a person filling the vacancy.——~~
- ~~• The Superintendent or his/her designee will then discuss with the employee to be transferred the reasons why the transfer is being considered. If, after the conference, the Superintendent continues to believe that the transfer should go forward, the employee will be so notified in writing. Refusal to comply with the reassignment may be grounds for dismissal.——~~

~~In the event that student enrollment increases or programs are replaced or reinstated for the next academic year at a school from which a person was involuntarily transferred, he/she will be given priority consideration if he/she wishes to return to the original school. In that case, the person will follow procedures as specified for request for transfer.——~~

~~Transfers will not be used as a means of disciplinary action. Transfers for promotion may be exempt from this policy.~~

Issued 9/25/06; Revised 2/22/10, ____/15



Memorandum

To: Members of the Board of Trustees

Through: Dr. Stephen W. Hefner
Superintendent

From: Dr. Allison Jacques *Allison Jacques, Ph.D.*
Chief Human Resources Officer

Date: February 17, 2016

Re: Board Policies – Section G

Issue: Proposed revisions to Board Policy – Section G

Background: Attached for your consideration are the recommended revisions for the following policy:

- GDQD - "Discipline, Suspension and Dismissal of Support Staff"

Recommendation: Administration recommends that the proposed revisions to selected "G" policy proceed to First Reading approval.

AJ/aw

Attachments - GDQD - Current Board Policy/Recommended Policy – Section G

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES**G - PERSONNEL****Policy GDQD Discipline, Suspension and Dismissal of Support Staff****Policy GDQD Discipline, Suspension and Dismissal of Support Staff**

Issued 12/09

Purpose: To establish the basic structure for the discipline, suspension and dismissal of support staff.

The board authorizes the superintendent to discipline, suspend or dismiss support staff as required. Principals should be actively involved in this process for their school.

Adopted 12/14/09

Legal references:

S.C. Code of Laws 1976, as amended:

Section 59-18-1300 - District accountability system.

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES

Recommended Revisions – February 22, 2016 - Discussion

Policy

DISCIPLINE, SUSPENSION AND DISMISSAL OF SUPPORT STAFF

Code **GDQD** Issued _____

Purpose: To establish the basic structure for the discipline, suspension and dismissal of support staff.

~~The Board authorizes the Superintendent to discipline, suspend or dismiss support staff as required. Principals should be actively involved in this process for their school.~~

Support staff are considered at-will employees. It will be the policy of this District to discipline and/or dismiss support staff whenever good and sufficient reasons for doing so present themselves. Accordingly, the Board authorizes the Superintendent or his/her designee to carry out such activities.

As appropriate, the administration is authorized to place an employee on administrative leave, with or without pay, while any necessary inquiry is conducted.

With respect to dismissal, such actions will be based on the recommendation of the employee's principal or immediate supervisor and will occur following a pre-termination opportunity before the Superintendent or his/her designee. At such a conference, the employee may present reasons why the recommendation of dismissal should not be accepted by the Superintendent or his/her designee.

Should the Superintendent or his/her designee decide to dismiss the employee, the notice will be in writing.

Grounds for immediate dismissal would include, but not be limited to, the following.

- insubordination
- job abandonment
- persistent neglect of duty
- willful violation of rules and regulations of the Board
- drunkenness
- conviction of a violation of the laws of this State or the United States
- gross immorality
- dishonesty
- illegal use, sale or possession of drugs or narcotics
- violation of safety procedures and guidelines
- unsatisfactory SLED report, as determined by the Superintendent or his/her designee
- harassment, intimidation or bullying

PAGE 2 – GDQD – DISCIPLINE, SUSPENSION AND DISMISSAL OF SUPPORT STAFF

- other acts of misconduct as determined by the administration

In a case where immediate termination is warranted, when possible, the Superintendent or his/her designee and the supervisor will conduct a conference with the employee to provide reasons for the termination and to allow the employee an opportunity to respond. In all cases the Superintendent or his/her designee will follow up with a written termination letter.

Criminal charges

The District may place on administrative leave, with or without pay, a support staff employee who has criminal charges filed against him/her. The District will investigate the actions which led to the employee's arrest and may take further disciplinary action against the employee independent of the resolution of the criminal charges.

Once the District's investigation has been concluded and/or after the criminal charges have been resolved, the employee will be advised of what, if any, further disciplinary action, up to and including termination, will be taken. On a case-by-case basis, the Superintendent or his/her designee may alter these procedures as may be appropriate.

Adopted 12/14/09; Revised ___/16

Legal references:

- A. ~~S.C. Code, 1976, as amended:~~
1. ~~Section 59-18-1300—District accountability system—~~



Memorandum

To: Members of the Board of Trustees

Through: Dr. Stephen W. Hefner
Superintendent

From: Dr. Allison Jacques *Allison Jacques, Ph.D.*
Chief Human Resources Officer

Date: February 17, 2016

Re: Board Policies – Section G

Issue: Proposed revisions to Board Policies – Section G

Background: Attached for your consideration are the recommended revisions for the following policies:

- GCK - "Professional Staff Assignments and Transfers"
- GCK-R - "Professional Staff Assignments and Transfers"

Recommendation: Administration recommends that the proposed revisions to selected "G" policies proceed to First Reading approval.

AJ/aw

Attachments - GCK - Current Board Policy/Recommended Policy – Section G
GCK-R – Current Board Policy/Recommended Policy – Section G

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES
G - PERSONNEL
Policy GCK Professional Staff Assignments and Transfers

Policy GCK Professional Staff Assignments and Transfers

Issued 2/10

Purpose: To establish the basic structure for the assignment and transfer of professional staff in the district.

Assignment

In order to ensure the highest quality of instruction, the superintendent is responsible for the placement of employees within the district. The superintendent may delegate the responsibility of the placement process to other administrators; however, he/she ultimately retains responsibility for staff assignments.

It is the policy of the district to assign instructional personnel to positions based on the needs of the district, qualifications of staff members and the expressed preferences of personnel. When it is not possible to meet all three of these components, the administration will assign employees in the following order: in accordance with the needs of the district and its students; where the administration believes the employee is most qualified to serve; and the expressed preference of the employee. The superintendent or his/her designee is authorized to reassign all personnel in the best interest of the district.

Placement of personnel at the school level is within the discretion of the building principal.

Transfer

Personnel transfer within the district may be affected on a voluntary or involuntary basis. Voluntary transfer occurs as a result of an individual's request for assignment to another school. Involuntary transfer may be required when a school's enrollment changes; programs are eliminated, modified or added; or a school opens or closes.

With regard to both voluntary and involuntary transfers, personnel will be assigned first in accordance with the needs of the school district, second where the administration believes that the employee is best qualified to serve, and third as to the expressed preference of the employee. Academic or long-term disability leave will not be construed as an interruption of continuous service; however, this leave time will not be included in the calculation of length of service to the district.

The superintendent is authorized to transfer personnel in the best interests of the district. Employees may be transferred at any time.

Adopted 5/20/74; Revised 11/16/81, 1/25/88, 6/20/88, 9/25/06, 2/22/10

Legal references:

S.C. Code, 1976, as amended:

[Section 59-25](#)-410 - Teacher to be notified of assignment by August 15th.

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES

Recommended Revisions – February 22, 2016 - Discussion

Policy

PROFESSIONAL STAFF ASSIGNMENTS AND TRANSFERS

Code GCK Issued _____

Purpose: To establish the basic structure for the assignment and transfer of professional staff in the District.

Assignment/Reassignment

In order to ensure the highest quality of instruction, the Superintendent or his/her designee will be ~~is~~ responsible for the placement of employees within the District. The Superintendent or his/her designee may delegate the responsibility of the placement process to other administrators; however, he/she ultimately retains responsibility for staff assignments.

~~It is the policy of the District to assign instructional personnel to positions based on the needs of the District, qualifications of staff members and the expressed preferences of personnel. When it is not possible to meet all three of these components, the administration will assign employees in the following order: in accordance with the needs of the District and its students; where the administration believes the employee is most qualified to serve; and the expressed preference of the employee. The Superintendent or his/her designee is authorized to reassign all personnel in the best interest of the District. An employee may be reassigned prior to the start of the school year or at any time during a school year.~~

Placement of personnel at the school level is within the discretion of the building principal.

Transfer

An employee who wishes to be considered for a lateral transfer to a new location must submit a transfer request form to the District's Human Resources Office. Requests for transfers will be handled in accordance with administrative rule GCK-R.

~~Personnel transfer within the District may be affected on a voluntary or involuntary basis. Voluntary transfer occurs as a result of an individual's request for assignment to another school. Involuntary transfer may be required when a school's enrollment changes; programs are eliminated, modified or added; or a school opens or closes.~~

~~With regard to both voluntary and involuntary transfers, personnel will be assigned first in accordance with the needs of the School District, second where the administration believes that the employee is best qualified to serve, and third as to the expressed preference of the employee. Academic or long term disability leave will not be construed as an interruption of continuous service; however, this leave time will not be included in the calculation of length of service to the~~

PAGE 2 – GCK – PROFESSIONAL STAFF ASSIGNMENTS AND TRANSFERS

District. _____

~~The Superintendent is authorized to transfer personnel in the best interests of the District. Employees may be transferred at any time.~~

Adopted 5/20/74; Revised 11/16/81, 1/25/88, 6/20/88, 9/25/06, 2/22/10, ____/15

Legal references:

- A. S.C. Code, 1976, as amended:
 - 1. Section 59-25-410 - Teacher to be notified of assignment by August 15th.

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES

G - PERSONNEL

Policy GCK Professional Staff Assignments and Transfers

AR GCK-R Professional Staff Assignments And Transfers

AR GCK-R Professional Staff Assignments And Transfers

Issued 12/10

Personnel transfers within the district may be affected on a voluntary or involuntary basis. The superintendent or his/her designee may make personnel assignments within the district on a voluntary or involuntary basis.

Voluntary transfer

Voluntary transfer occurs as a result of an individual's request for assignment to another school. Whenever vacancies develop in new or existing positions, consideration will be given to qualified applicants among current staff members. If an employee would like to be considered for a lateral transfer, the following procedure will be used.

- The person desiring a transfer for the next academic year must discuss it with his/her principal/director (if in a school) or with his/her immediate supervisor (if on the district level).
- The person must then complete a request for transfer form. Request for transfer forms are issued in early January with a deadline for submission to the chief human resource services officer.

When a vacancy for which the person qualifies exists in the school to which the transfer is requested, the person's name will be referred to the principal who will schedule an interview with him/her. Transfer requests will not be made after May 15 in order to ensure stability in school staff for the coming year.

Based upon the recommendation of the site supervisor (and/or other immediate supervisors involved), the normal hiring process will occur.

Involuntary transfer/reassignment

Involuntary transfers may be required when a school's enrollment changes; programs are eliminated, modified or added; or a school opens or closes. If, in the opinion of the superintendent, a transfer would be in the best interest of the district, the superintendent or his/her designee will advise the site supervisor and the employee of the transfer and confirm the reassignment in writing to the employee. Refusal to comply with the transfer may be grounds for dismissal.

In the event that involuntary transfers would be in the best interest of the district, the superintendent will adhere to the following guidelines.

- The superintendent is not limited to considering for involuntary transfers only positions in a particular school, area or program in which the loss of enrollment, program change or financial emergency has occurred.
- The superintendent will determine the appropriate weight to give to these factors depending on the needs and circumstances of the district. Length of service in the district will be a consideration only where the need arises to choose for involuntary transfer among employees considered by the administration to be equally competent in their performance.

Once the board has approved the elimination of the specified positions or changes to be made in

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programs, the superintendent will use specific criteria to select employees who are to be considered for involuntary transfer. The superintendent will make the decisions based on the following criteria and in compliance with board policy GCQA/GCQB Professional Personnel Reduction in Force.

- The superintendent will make a recommendation to the board based on first, the contract level according to state law, and the remaining criteria in no particular order.

Certified personnel

- contract level achieved (according to state law)
 - quality of instruction
 - certification area and/or type
 - degrees earned
 - certification in other areas which may be available
 - qualification and ability as determined by district evaluation procedures
 - attendance record
 - principal or supervisor's recommendation
 - extracurricular needs of the schools
 - total years of administrative, teaching and/or paraprofessional experience in the district
 - any other factor considered appropriate by the superintendent
- The superintendent or his/her designee will discuss the need for the reassignment with the employee's current site supervisor and with the site supervisor of the position and/or school to which reassignment is being contemplated and the qualifications possessed by a person filling the vacancy.

The chief human resource services officer will identify and list all employees who would be eligible for transfer based on the needs of the program in his/her school and in the school where the vacancy exists, as well as the qualifications of the person needed to fill that vacancy.

The principal will meet with the person being transferred to give the reason for the change and establish a date for the transfer.

In the event that student enrollment increases or programs are replaced or reinstated for the next academic year at a school from which a person was involuntarily transferred, he/she will be given priority consideration if he/she wishes to return to the original school. In that case, the person will follow procedures specified for voluntary transfer.

Transfers will not be used as a means of disciplinary action. Transfers for promotion may be exempt from this policy.

Issued 5/20/74; Revised 11/16/81, 6/20/88, 9/25/06, 12/13/10

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES

5

Recommended Revisions – February 22, 2016 - Discussion

Administrative Rule

PROFESSIONAL STAFF ASSIGNMENTS AND TRANSFERS

Code **GCK-R** Issued _____

~~Personnel transfers within the District may be affected on a voluntary or involuntary basis.~~ The Superintendent or his/her designee may make personnel assignments within the District on a voluntary or involuntary basis.

Reassignment

If, in the opinion of the Superintendent, a reassignment would be in the best interests of the District, the Superintendent or his/her designee will advise the employee of the reassignment and confirm the reassignment in writing to the employee. Refusal to comply with the reassignment may be grounds for dismissal.

Requests for Transfer

Voluntary transfer

~~Voluntary transfer occurs as a result of an individual's request for assignment to another school. Whenever vacancies develop in new or existing positions, consideration will be given to qualified applicants among current staff members.~~ If an employee would like to be considered for a lateral transfer, the following procedure will be used.

- The person desiring a transfer for the next academic year must discuss it with his/her principal/director (if in a school) or with his/her immediate supervisor (if on the District level).
- The person must then complete a request for transfer form. Request for transfer forms are issued in early January with a deadline for submission to the Chief Human Resources Officer.

When a vacancy for which the person qualifies exists in the school to which the transfer is requested, the person's name will be referred to the principal who will schedule an interview with him/her. Transfer requests will not be made after May 31 in order to ensure stability in school staff for the coming year.

Based upon the recommendation of the site supervisor (and/or other immediate supervisors involved), the normal hiring process will occur.

If a position becomes available after the deadline date, and if it is in the judgment of the Superintendent or his/her designee that a requested position transfer is in the best interest of the

PAGE 2 – GCK-R – PROFESSIONAL STAFF ASSIGNMENTS AND TRANSFERS

District, such transfer may be made.

Involuntary transfer/reassignment

~~Involuntary transfers may be required when a school's enrollment changes; programs are eliminated, modified or added; or a school opens or closes. If, in the opinion of the Superintendent, a transfer would be in the best interest of the District, the Superintendent or his/her designee will advise the site supervisor and the employee of the transfer and confirm the reassignment in writing to the employee. Refusal to comply with the transfer may be grounds for dismissal.~~

~~In the event that involuntary transfers would be in the best interest of the District, the Superintendent will adhere to the following guidelines.~~

- ~~• The Superintendent is not limited to considering for involuntary transfers only positions in a particular school, area or program in which the loss of enrollment, program change or financial emergency has occurred.~~
- ~~• The Superintendent will determine the appropriate weight to give to these factors depending on the needs and circumstances of the district. Length of service in the District will be a consideration only where the need arises to choose for involuntary transfer among employees considered by the administration to be equally competent in their performance.~~
- ~~• Once the Board has approved the elimination of the specified positions or changes to be made in programs, the Superintendent will use specific criteria to select employees who are to be considered for involuntary transfer. The Superintendent will make the decisions based on the following criteria and in compliance with Board Policy GCQA/GCQB Professional Personnel Reduction in Force.~~
- ~~• The Superintendent will make a recommendation to the board based on first, the contract level according to State law, and the remaining criteria in no particular order.~~

Certified personnel

- ~~— contract level achieved (according to state law) —~~
- ~~— quality of instruction —~~
- ~~— certification area and/or type —~~
- ~~— degrees earned —~~
- ~~— certification in other areas which may be available —~~
- ~~— qualification and ability as determined by District evaluation procedures —~~
- ~~— attendance record —~~
- ~~— principal or supervisor's recommendation —~~
- ~~— extracurricular needs of the schools —~~
- ~~— total years of administrative, teaching and/or paraprofessional experience in the District —~~
- ~~— any other factor considered appropriate by the Superintendent —~~
- ~~• The Superintendent or his/her designee will discuss the need for the reassignment with the employee's current site supervisor and with the site supervisor of the position and/or school to which reassignment is being contemplated and the qualifications possessed by a~~

PAGE 3 – GCK-R – PROFESSIONAL STAFF ASSIGNMENTS AND TRANSFERS

~~person filling the vacancy.——~~

~~The Chief Human Resource Services Officer will identify and list all employees who would be eligible for transfer based on the needs of the program in his/her school and in the school where the vacancy exists, as well as the qualifications of the person needed to fill that vacancy.——~~

~~The principal will meet with the person being transferred to give the reason for the change and establish a date for the transfer.——~~

~~In the event that student enrollment increases or programs are replaced or reinstated for the next academic year at a school from which a person was involuntarily transferred, he/she will be given priority consideration if he/she wishes to return to the original school. In that case, the person will follow procedures specified for voluntary transfer.——~~

~~Transfers will not be used as a means of disciplinary action. Transfers for promotion may be exempt from this policy.~~

Issued 5/20/74; Revised 11/16/81, 6/20/88, 9/25/06, 12/13/10, ____/15



Memorandum

To: Members of the Board of Trustees

Through: Dr. Stephen W. Hefner
Superintendent

From: Dr. Allison Jacques *Allison Jacques, Ph.D.*
Chief Human Resources Officer

Date: February 17, 2016

Re: Board Policy – Section C

Issue: Proposed revisions to Board Policy – Section C

Background: Attached for your consideration is the deletion of the following policy:

- CFC – “Assignment and Transfer of Building Administrators”

Recommendation: Administration recommends that the proposed deletion to selected “C” policy proceed to First Reading approval.

AJ/aw

Attachments - CFC - Current Board Policy/Recommended Policy – Section C

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES
C - GENERAL SCHOOL ADMINISTRATION
Policy CFC Assignment and Transfer of Building Administrators

Policy CFC Assignment and Transfer of Building Administrators

Issued 11/06

Purpose: To establish the basic structure for the assignment and transfer of building administrators.

The superintendent is responsible for the assignment of all administrators.

Appropriate placement and transfer practices for school administrators should enhance effective utilization of skills and abilities and the professional growth of individuals. These objectives can best be achieved through the provision of some variety of school assignment over a period of years, and the best possible matching of known administrator strengths to identified current needs of a particular school.

In making decisions on placement, the superintendent will give consideration to the following.

- needs of the school and district as perceived by the board and central administration
- length of current assignment in a school
- compatibility of administrative style among administrators in the school
- opportunities provided for professional growth in the proposed assignment
- appropriate training to enable effective planning and educational continuity
- administrator's expressed preferences

Compulsory transfers and/or the reassignment of administrative personnel are subject to the district's grievance procedure set forth in policy [GBK](#), [GCM](#) and [GBM](#).

The board will review administrative transfers involving a loss of rank and/or income in a grievance hearing upon the specific request of the affected administrator.

Adopted 1/25/88; Revised 11/27/06

Legal references:

S.C. Code, 1976, as amended:

[Section 59-25](#)-410 - Notification of employment for ensuing year; notification of assignment.

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES

Recommended Deletion – February 17, 2016 - Discussion

Policy

~~ASSIGNMENT AND TRANSFER OF BUILDING ADMINISTRATORS~~

Code CFC Issued _____

~~Purpose: To establish the basic structure for the assignment and transfer of building administrators.~~

~~The Superintendent is responsible for the assignment of all administrators.~~

~~Appropriate placement and transfer practices for school administrators should enhance effective utilization of skills and abilities and the professional growth of individuals. These objectives can best be achieved through the provision of some variety of school assignment over a period of years, and the best possible matching of known administrator strengths to identified current needs of a particular school.~~

~~In making decisions on placement, the Superintendent will give consideration to the following:~~

- ~~*—needs of the school and District as perceived by the Board and central administration~~
- ~~*—compatibility of administrative style among administrators in the school~~
- ~~*—length of current assignment in a school~~
- ~~*—opportunities provided for professional growth in the proposed assignment~~
- ~~*—appropriate training to enable effective planning and educational continuity~~
- ~~*—administrator's expressed preferences~~

~~Compulsory transfers and/or the reassignment of administrative personnel are subject to the District's grievance procedure set forth in policy GBK, GCM and GBM.~~

~~The Board will review administrative transfers involving a loss of rank and/or income in a grievance hearing upon the specific request of the affected administrator.~~

~~Adopted 1/25/88; Revised 11/27/06~~

~~Legal references:~~

~~A. — S.C. Code, 1976, as amended:~~

- ~~1. — Section 59-25-410—Notification of employment for ensuing year; notification of assignment.~~
- ~~2. — Section 59-24-15—Rights of certified personnel employed as administrators.~~