district five
OF LEXINGTON & RICHLAND COUNTIES

AGENDA
BOARD OF TRUSTEES
REGULAR MEETING
RIVER SPRINGS ELEMENTARY SCHOOL'S THEATER
APRIL 25, 2016

1. Call to order at 6:00 p.m.

2. Enter executive session to consider the following:

    a. Selected employment items (Exhibit A)
    b. Receipt of legal advice regarding a procurement matter
    c. Update on active and pending litigation involving Lexington-Richland District Five

3. Call to order at 7:00 p.m.

4. Welcoming remarks

5. Invocation – Beth Hutchison

6. Pledge of Allegiance – Mason Favati – fifth grade student at River Springs Elementary School

7. School Board Spotlight

8. Approval of the Agenda

9. Approval of the minutes of the April 12, 2016 board meeting

10. Superintendent's Report

    a. Office of Finance and Operations
        1. Monthly Financial Reports (Exhibit B)

11. Public participation*

ACTION AGENDA

12. Action as Necessary or Appropriate on Matters Discussed in Executive Session

13. Second and final reading of proposed Administrative Rule KBE-R "Relations with Parent Organizations" (Exhibit C)

14. Request for Rezoning of "Shoals Landing" Property (Exhibit D)

DISCUSSION

15. Proposed General Fund Budget for 2016-2017 (Exhibit E)

16. Adjourn

FOR YOUR INFORMATION

17. SIC School Improvement Council Reports (Exhibit F)

18. The next regular school board meeting will be May 9 at Chapin High 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/ April 12, 2016

The Board of Trustees of School District Five of Lexington and Richland Counties met at the District Administration Building 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
Dr. Michael Harris, Chief Student Services Officer
Dr. Allison Jacques, Chief Human Resources Officer
Mr. Len Richardson, Chief Finance Officer

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

The Invocation was given by Jondy Loveless, Secretary, Board of Trustees. The Pledge of Allegiance was led by Michelle Kim, a student at CrossRoads Intermediate School.

The Board conducted the School Board Spotlight.

During the Superintendent's Report, Dr. Jacques presented a report on "Read to Succeed" Initiative.

During public participation, Kim Murphy spoke regarding Executive Session.

Mark Bounds presented a request for rezoning of "Shoals Landing" property (Exhibit H)

Len Richardson presented the parameters for the General Fund Budget for 2016-2017.

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES Meeting of	BAUMGARDNER	GANTT	HALTIWANGER	HAMMOND	HUTCHISON	LOVELESS	WHITE
1. M. Loveless S. Baumgardner Enter executive session to consider the following: a) selected employment items (Exhibit A): b) 2016-2017 reappointment recommendations (Exhibit B); and c) contractual matter regarding construction	X	X	A	X	X	X	A
2. M. Baumgardner S. Hutchison Approve the agenda	X	X	X	X	X	X	X
3. M. Baumgardner S. Loveless Approve the minutes of the March 14, 2016 board meeting	X	X	X	X	X	X	X
4. M. Baumgardner S. Hammond Approve the selected employment items (Exhibit A)	X	X	X	X	X	X	X
5. M. Hutchison S. Haltiwanger Approve the 2016-2017 reappointment recommendations (Exhibit B)	X	X	X	X	X	X	X
6. M. Haltiwanger S. Loveless Approve second and final reading of proposed revisions to board policy GDJ "Support Staff Assignments and Transfers"; GDJ-R "Support Staff Assignments and Transfers" (Exhibit C)	X	X	X	X	X	X	X
7. M. Haltiwanger S. White Approve second and final reading of proposed revisions to board policy GDQD "Discipline, Suspension and Dismissal of Support Staff" (Exhibit D)	X	X	X	X	X	X	X
8. M. Baumgardner S. Loveless Approve second and final reading of proposed revisions to board policy GCK "Professional Staff Assignments and	X	X	X	X	X	X	X

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

SCHOOL DISTRICT FIVE OF LEXINGTON AND RICHLAND COUNTIES Meeting of	BAUMGARDNER	GANTT	HALTIWANGER	HAMMOND	HUTCHISON	LOVELESS	WHITE
Transfers"; GCK-R "Professional Staff Assignments and Transfers" (Exhibit E)							
9. M. Hutchison S. Hammond Approve second and final reading of deletion of board policy CFC "Assignment and Transfer of Building Administrators" (Exhibit F)	X	X	X	X	X	X	X
10. M. Baumgardner S. Hammond Approve first reading of proposed Administration Rule KBE-R "Relations with Parent Organizations" (Exhibit G)	X	X	X	X	X	X	X
11. M. Hutchison S. Baumgardner Adjourn at 8:23 p.m.	X	X	X	X	X	X	X

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

Exhibit B

EXHIBIT B

district five
OF LEXINGTON & RICHLAND COUNTIES

MEMORANDUM

To:	Members of the Board of Trustees
Through:	Stephen Hefner, Ed.D. Superintendent
From:	A. Len Richardson Chief Finance Officer
Date:	April 20, 2016
Re:	April 25, 2016 Board Meeting Monthly Financial Reports – February - March 2016

Attached for your information are the revenue and expenditure reports for February – March 2016.

ALR:tl

Attachment

www.lexrich5.org
1020 Dutch Fork Road • Irmo, South Carolina 29063 • (803) 476-8000

School District Five of Lexington and Richland

Board Report Revenue

Fiscal Year: 2015-2016

From Date: 2/1/2016 To Date: 3/31/2016

☐ Subtotal by Collapse Mask ☐ Include pre encumbrance ☑ Print accounts with zero balance ☑ Filter Encumbrance Detail by Date Range

☐ Exclude Inactive Accounts with zero balance

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)	($360,595.13)	($33,364,655.01)	$449,941.01	$0.00	$449,941.01	-1.37%
100.000.0111002.0000.000	Ad Valorem Taxes - Richland	($14,787,770.00)	($5,751,563.58)	($15,880,132.74)	$1,092,362.74	$0.00	$1,092,362.74	-7.39%
100.000.0112001.0000.000	Vehicle Taxes - Lexington	($6,179,948.00)	($1,253,974.74)	($5,137,966.81)	($1,041,981.19)	$0.00	($1,041,981.19)	16.86%
100.000.0112002.0000.000	Vehicle Taxes - Richland	($5,704,567.00)	($486,825.53)	($3,539,268.12)	($2,165,298.88)	$0.00	($2,165,298.88)	37.96%
100.000.0113001.0000.000	Delinquent Taxes - Lexington	($1,012,664.00)	($30,638.86)	($633,077.73)	($379,586.27)	$0.00	($379,586.27)	37.48%
100.000.0113002.0000.000	Delinquent Taxes - Richland	($795,665.00)	$0.00	($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)	($41,395.81)	($138,923.32)	$22,923.32	$0.00	$22,923.32	-19.76%
100.000.0114002.0000.000	Penalties & Interest on Taxes	($84,000.00)	$0.00	($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)	($764,354.16)	($907,481.85)	($91,818.15)	$0.00	($91,818.15)	9.19%
100.000.0128002.0000.000	Revenue in Lieu of Taxes - Ric	$0.00	($6,217.85)	($44,392.21)	$44,392.21	$0.00	$44,392.21	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)	($3,730.68)	$3,730.68	$0.00	$3,730.68	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)	($29,958.05)	($69,082.37)	$9,082.37	$0.00	$9,082.37	-15.14%
100.000.0174000.0000.000	Student Fees	($21,000.00)	($9,427.10)	($22,780.68)	$1,780.68	$0.00	$1,780.68	-8.48%
100.000.0190000.0000.000	Other Revenues from Local Sour	$0.00	($510.00)	($3,410.00)	$3,410.00	$0.00	$3,410.00	0.00%
100.000.0191000.0000.000	Rentals	($70,000.00)	($32,830.00)	($129,875.00)	$59,875.00	$0.00	$59,875.00	-85.54%
100.000.0193000.0000.000	Medicaid	($100,000.00)	($78,307.02)	($78,307.02)	($21,692.98)	$0.00	($21,692.98)	21.69%
100.000.0195000.0000.000	Refund of Prior Year	($8,000.00)	$189.00	($23,011.70)	$15,011.70	$0.00	$15,011.70	-187.65%
100.000.0199200.0000.000	E-Rate Revenue	$0.00	$0.00	($205,418.41)	$205,418.41	$0.00	$205,418.41	0.00%
100.000.0199300.0000.000	Insurance Proceeds	($10,000.00)	($22,777.18)	($22,777.18)	$12,777.18	$0.00	$12,777.18	-127.77%
100.000.0199900.0000.000	Other Local Revenue	($430,000.00)	($5,305.72)	($41,292.33)	($388,707.67)	$0.00	($388,707.67)	90.40%
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)	($420,727.76)	($229,272.24)	$0.00	($229,272.24)	35.27%
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)	($2,693,363.30)	($11,758,451.05)	($3,124,274.95)	$0.00	($3,124,274.95)	20.99%
100.000.0318100.0000.000	Retiree Health Insurance	($4,544,877.00)	($749,261.83)	($2,972,742.26)	($1,572,134.74)	$0.00	($1,572,134.74)	34.59%
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	($249,815.08)	($1,148,157.22)	$1,148,157.22	$0.00	$1,148,157.22	0.00%
100.000.0331200.0000.000	EFA - Primary	$0.00	($767,420.10)	($3,625,010.83)	$3,625,010.83	$0.00	$3,625,010.83	0.00%
100.000.0331300.0000.000	EFA - Elementary	$0.00	($1,479,075.26)	($6,907,113.39)	$6,907,113.39	$0.00	$6,907,113.39	0.00%
100.000.0331400.0000.000	EFA - High School	$0.00	($355,604.74)	($1,487,914.21)	$1,487,914.21	$0.00	$1,487,914.21	0.00%
100.000.0331500.0000.000	EFA - Trainable Mentally Handi	$0.00	($13,256.76)	($66,369.95)	$66,369.95	$0.00	$66,369.95	0.00%
100.000.0331600.0000.000	EFA - Speech Handicapped	$0.00	($423,150.24)	($2,094,068.10)	$2,094,068.10	$0.00	$2,094,068.10	0.00%
100.000.0331700.0000.000	EFA - Homebound	$0.00	$0.00	($24,638.17)	$24,638.17	$0.00	$24,638.17	0.00%
100.000.0332100.0000.000	EFA - Emotionally Handicapped	$0.00	($25,052.49)	($131,487.07)	$131,487.07	$0.00	$131,487.07	0.00%
100.000.0332200.0000.000	EFA - Educable Mentally Handic	$0.00	($13,599.61)	($43,209.50)	$43,209.50	$0.00	$43,209.50	0.00%
100.000.0332300.0000.000	EFA - Learning Disabilities	$0.00	($398,153.46)	($1,714,322.91)	$1,714,322.91	$0.00	$1,714,322.91	0.00%
100.000.0332400.0000.000	EFA - Hearing Handicapped	$0.00	($9,625.29)	($55,512.56)	$55,512.56	$0.00	$55,512.56	0.00%
100.000.0332500.0000.000	EFA - Visually Handicapped	$0.00	($10,870.24)	($55,222.50)	$55,222.50	$0.00	$55,222.50	0.00%
100.000.0332600.0000.000	EFA - Orthopedically Handicapp	$0.00	($7,608.64)	($34,330.08)	$34,330.08	$0.00	$34,330.08	0.00%
100.000.0332700.0000.000	EFA - Vocational	$0.00	($1,243,368.66)	($5,679,894.56)	$5,679,894.56	$0.00	$5,679,894.56	0.00%
100.000.0333100.0000.000	EFA - Autism	$0.00	($149,062.67)	($605,526.95)	$605,526.95	$0.00	$605,526.95	0.00%
100.000.0333200.0000.000	EFA - Gifted and Talented Educ	$0.00	($184,213.62)	($897,998.01)	$897,998.01	$0.00	$897,998.01	0.00%
100.000.0333400.0000.000	EFA - Limited English Proficie	$0.00	($18,598.74)	($101,186.80)	$101,186.80	$0.00	$101,186.80	0.00%
100.000.0335100.0000.000	EFA - Academic Assistance	$0.00	($178,052.04)	($527,952.90)	$527,952.90	$0.00	$527,952.90	0.00%
100.000.0335200.0000.000	EFA - Pupils in Poverty	$0.00	($404,570.64)	($1,841,894.10)	$1,841,894.10	$0.00	$1,841,894.10	0.00%
100.000.0381001.0000.000	Local Property Tax Relief (Tie	($6,611,007.00)	$0.00	($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)	$0.00	($3,572,157.21)	($396,906.79)	$0.00	($396,906.79)	10.00%

School District Five of Lexington and Richland

Board Report Revenue

From Date: 2/1/2016 To Date: 3/31/2016

Fiscal Year: 2015-2016

☐ Subtotal by Collapse Mask ☐ Include pre encumbrance ☑ Print accounts with zero balance ☑ Filter Encumbrance Detail by Date Range

☐ Exclude Inactive Accounts with zero balance

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
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%
100.000.0382500.0000.000	Property Tax Relief - Tier 3	($29,939,069.00)	($5,987,813.80)	($17,963,441.40)	($11,975,627.60)	$0.00	($11,975,627.60)	40.00%
100.000.0383001.0000.000	Merchants Inventory Tax - Lexi	($192,912.00)	$0.00	($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)	($4,268.58)	($12,805.74)	($3,969.26)	$0.00	($3,969.26)	23.66%
100.000.0384001.0000.000	Manufacturers Depr. Reimbursem	($300,626.00)	$0.00	$0.00	($300,626.00)	$0.00	($300,626.00)	100.00%
100.000.0384002.0000.000	Manufacturers Depr. Reimbursem	($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)	($17,155.90)	($130,800.55)	$32,651.55	$0.00	$32,651.55	-33.27%
100.000.0389002.0000.000	Motor Carrier Vehicle Tax - Ri	($41,851.00)	$0.00	($565,347.89)	$523,496.89	$0.00	$523,496.89	-1250.86%
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	($139.00)	($744.50)	$744.50	$0.00	$744.50	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)	$0.00	($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)	$0.00	($53,561.54)	($211,438.46)	$0.00	($211,438.46)	79.79%
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)	($24,371,651.83)	($132,847,901.53)	($33,603,119.47)	$0.00	($33,603,119.47)	20.19%
	Grand Total:	($166,451,021.00)	($24,371,651.83)	($132,847,901.53)	($33,603,119.47)	$0.00	($33,603,119.47)	20.19%

End of Report

School District Five of Lexington and Richland

Board Report Expenditures

Fiscal Year: 2015-2016

From Date: 2/1/2016 To Date: 3/31/2016

☐ Subtotal by Collapse Mask ☐ Include pre encumbrance ☐ Print accounts with zero balance ☑ Filter Encumbrance Detail by Date Range

☐ Exclude Inactive Accounts with zero balance

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.111.1000000.0000.000	Salaries	$4,656,984.27	$739,357.97	$2,792,592.40	$1,864,391.87	$1,636,734.32	$227,657.55	4.89%
100.111.2000000.0000.000	Employee Benefits	$1,938,715.24	$300,889.62	$1,117,180.91	$821,534.33	$675,223.20	$146,311.13	7.55%
100.111.3000000.0000.000	Purchased Services	$2,492.00	$0.00	$570.00	$1,922.00	$0.00	$1,922.00	77.13%
100.111.4000000.0000.000	Supplies and Materials	$58,202.88	$4,418.62	$41,003.87	$17,199.01	$1,464.45	$15,734.56	27.03%
	FUNCTION: Kindergarten Programs - 111	$6,656,394.39	$1,044,666.21	$3,951,347.18	$2,705,047.21	$2,313,421.97	$391,625.24	5.88%
100.112.1000000.0000.000	Salaries	$11,345,892.27	$1,989,711.04	$7,469,493.84	$3,876,398.43	$4,438,800.25	($562,401.82)	-4.96%
100.112.2000000.0000.000	Employee Benefits	$4,351,908.63	$733,674.16	$2,722,558.24	$1,629,350.39	$1,645,064.83	($15,714.44)	-0.36%
100.112.3000000.0000.000	Purchased Services	$5,267.00	$0.00	$3,759.41	$1,507.59	$0.00	$1,507.59	28.62%
100.112.4000000.0000.000	Supplies and Materials	$264,348.51	$9,751.83	$133,467.79	$130,880.72	$23,385.66	$107,495.06	40.66%
	FUNCTION: Primary Programs - 112	$15,967,416.41	$2,733,137.03	$10,329,279.28	$5,638,137.13	$6,107,250.74	($469,113.61)	-2.94%
100.113.1000000.0000.000	Salaries	$20,696,246.42	$3,328,003.45	$12,509,196.24	$8,187,050.18	$7,494,870.17	$692,180.01	3.34%
100.113.2000000.0000.000	Employee Benefits	$7,773,383.41	$1,227,076.60	$4,562,254.98	$3,211,128.43	$2,763,915.15	$447,213.28	5.75%
100.113.3000000.0000.000	Purchased Services	$19,304.00	$1,672.45	$8,793.77	$10,510.23	$974.20	$9,536.03	49.40%
100.113.4000000.0000.000	Supplies and Materials	$386,039.27	$22,772.21	$209,843.96	$176,195.31	$36,439.55	$139,755.76	36.20%
	FUNCTION: Elementary Programs - 113	$28,874,973.10	$4,579,524.71	$17,290,088.95	$11,584,884.15	$10,296,199.07	$1,288,685.08	4.46%
100.114.1000000.0000.000	Salaries	$16,450,141.17	$2,686,622.40	$10,182,888.68	$6,267,252.49	$5,965,406.30	$301,846.19	1.83%
100.114.2000000.0000.000	Employee Benefits	$5,915,526.00	$924,128.22	$3,469,276.13	$2,446,249.87	$2,063,519.42	$382,730.45	6.47%
100.114.3000000.0000.000	Purchased Services	$1,714,228.63	$2,270.58	$73,118.86	$1,641,109.77	$55,000.00	$1,586,109.77	92.53%
100.114.4000000.0000.000	Supplies and Materials	$493,630.37	$15,614.21	$221,628.74	$272,001.63	$54,318.93	$217,682.70	44.10%
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	$24,579,626.17	$3,628,635.41	$13,952,012.41	$10,627,613.76	$8,138,244.65	$2,489,369.11	10.13%
100.115.1000000.0000.000	Salaries	$2,558,230.23	$426,594.36	$1,619,568.41	$938,661.82	$912,452.88	$26,208.94	1.02%
100.115.2000000.0000.000	Employee Benefits	$939,856.81	$147,935.58	$558,338.19	$381,518.62	$315,823.08	$65,695.54	6.99%
100.115.3000000.0000.000	Purchased Services	$25,800.00	$6,300.00	$6,656.18	$19,143.82	$18,900.00	$243.82	0.95%
100.115.4000000.0000.000	Supplies and Materials	$110,776.00	$20,225.91	$90,989.80	$19,786.20	$8,586.13	$11,200.07	10.11%
	FUNCTION: Career and Technology Education (Vocational) Prog - 115	$3,634,663.04	$601,055.85	$2,275,552.58	$1,359,110.46	$1,255,762.09	$103,348.37	2.84%
100.121.1000000.0000.000	Salaries	$624,446.90	$102,544.23	$396,033.26	$228,413.64	$230,010.22	($1,596.58)	-0.26%
100.121.2000000.0000.000	Employee Benefits	$224,382.30	$35,874.81	$132,488.58	$91,893.72	$78,719.47	$13,174.25	5.87%
100.121.4000000.0000.000	Supplies and Materials	$1,260.00	$0.00	$686.03	$573.97	$0.00	$573.97	45.55%
	FUNCTION: Educable Mentally Handicapped - 121	$850,089.20	$138,419.04	$529,207.87	$320,881.33	$308,729.69	$12,151.64	1.43%
100.122.1000000.0000.000	Salaries	$447,279.00	$61,527.11	$245,159.53	$202,119.47	$161,018.09	$41,101.38	9.19%
100.122.2000000.0000.000	Employee Benefits	$158,960.61	$25,429.13	$99,030.57	$59,930.04	$62,750.56	($2,820.52)	-1.77%
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	$607,859.61	$86,956.24	$344,190.10	$263,669.51	$223,768.65	$39,900.86	6.56%
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	$23,497.12	$83,542.76	$87,260.24	$52,868.38	$34,391.86	20.14%
100.124.2000000.0000.000	Employee Benefits	$66,527.08	$9,213.56	$33,083.44	$33,443.64	$20,730.49	$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	$32,710.68	$116,626.20	$120,843.88	$73,598.87	$47,245.01	19.90%
100.125.1000000.0000.000	Salaries	$276,178.00	$37,599.49	$144,882.98	$131,295.02	$79,493.15	$51,801.87	18.76%

School District Five of Lexington and Richland

Board Report Expenditures

From Date: 2/1/2016 To Date: 3/31/2016

Fiscal Year: 2015-2016

☐ Subtotal by Collapse Mask ☐ Include pre encumbrance ☐ Print accounts with zero balance ☑ Filter Encumbrance Detail by Date Range

☐ Exclude Inactive Accounts with zero balance

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.125.2000000.0000.000	Employee Benefits	$97,566.96	$12,612.74	$45,952.31	$51,614.65	$26,518.42	$25,096.23	25.72%
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	$50,212.23	$190,835.29	$182,981.67	$106,011.57	$76,970.10	20.59%
100.126.1000000.0000.000	Salaries	$1,479,641.69	$246,469.04	$944,447.83	$535,193.86	$560,267.40	($25,073.54)	-1.69%
100.126.2000000.0000.000	Employee Benefits	$534,865.25	$87,161.36	$328,391.90	$206,473.35	$201,725.27	$4,748.08	0.89%
100.126.4000000.0000.000	Supplies and Materials	$5,490.00	$0.00	$2,181.36	$3,308.64	$0.00	$3,308.64	60.27%
	FUNCTION: Speech Handicapped - 126	$2,019,996.94	$333,630.40	$1,275,021.09	$744,975.85	$761,992.67	($17,016.82)	-0.84%
100.127.1000000.0000.000	Salaries	$4,772,315.40	$711,028.65	$2,699,803.16	$2,072,512.24	$1,606,365.14	$466,147.10	9.77%
100.127.2000000.0000.000	Employee Benefits	$1,788,788.14	$259,298.59	$975,249.00	$813,539.14	$587,236.09	$226,303.05	12.65%
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	$0.00	$5,009.26	$12,108.74	$174.31	$11,934.43	69.72%
	FUNCTION: Learning Disabilities - 127	$6,578,971.54	$970,327.24	$3,680,061.42	$2,898,910.12	$2,194,525.54	$704,384.58	10.71%
100.128.1000000.0000.000	Salaries	$598,878.00	$85,596.09	$321,207.95	$277,670.05	$190,450.07	$87,219.98	14.56%
100.128.2000000.0000.000	Employee Benefits	$264,727.45	$35,313.57	$131,902.28	$132,825.17	$79,189.21	$53,635.96	20.26%
100.128.4000000.0000.000	Supplies and Materials	$2,349.00	$108.79	$817.02	$1,531.98	$42.18	$1,489.80	63.42%
	FUNCTION: Emotionally Handicapped - 128	$865,954.45	$121,018.45	$453,927.25	$412,027.20	$269,681.46	$142,345.74	16.44%
100.129.1000000.0000.000	Salaries	$262,051.50	$47,099.05	$176,621.08	$85,430.42	$105,972.72	($20,542.30)	-7.84%
100.129.2000000.0000.000	Employee Benefits	$92,051.00	$17,830.21	$64,607.15	$27,443.85	$40,117.05	($12,673.20)	-13.77%
	FUNCTION: Coordinated Early Intervening Services (CEIS) - 129	$354,102.50	$64,929.26	$241,228.23	$112,874.27	$146,089.77	($33,215.50)	-9.38%
100.135.1000000.0000.000	Salaries	$5,000.00	$833.34	$3,124.97	$1,875.03	$1,875.03	$0.00	0.00%
100.135.2000000.0000.000	Employee Benefits	$1,185.50	$193.42	$729.14	$456.36	$435.22	$21.14	1.78%
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	$1,026.76	$3,943.24	$2,332.26	$2,310.25	$22.01	0.35%
100.136.1000000.0000.000	Salaries	$8,314.20	$1,935.92	$7,259.70	$1,054.50	$4,355.79	($3,301.29)	-39.71%
100.136.2000000.0000.000	Employee Benefits	$2,946.49	$611.12	$2,280.83	$665.66	$1,374.96	($709.30)	-24.07%
	FUNCTION: Preschool Handicapped Itinerant (3 and 4 yr olds) - 136	$11,260.69	$2,547.04	$9,540.53	$1,720.16	$5,730.75	($4,010.59)	-35.62%
100.137.1000000.0000.000	Salaries	$918,270.25	$140,299.04	$529,007.73	$389,262.52	$316,972.06	$72,290.46	7.87%
100.137.2000000.0000.000	Employee Benefits	$396,986.90	$58,547.24	$220,744.83	$176,242.07	$131,981.07	$44,261.00	11.15%
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	$198,846.28	$749,823.25	$565,973.90	$448,953.13	$117,020.77	8.89%
100.138.1000000.0000.000	Salaries	$5,055.55	$1,017.76	$3,816.60	$1,238.95	$2,289.98	($1,051.03)	-20.79%
100.138.2000000.0000.000	Employee Benefits	$2,169.85	$336.44	$1,256.18	$913.67	$756.99	$156.68	7.22%
	FUNCTION: Preschool Handicapped Homebased (3 & 4 yr olds) - 138	$7,225.40	$1,354.20	$5,072.78	$2,152.62	$3,046.97	($894.35)	-12.38%
100.139.1000000.0000.000	Salaries	$968,017.28	$161,431.88	$611,635.77	$356,381.51	$358,843.06	($2,461.55)	-0.25%
100.139.2000000.0000.000	Employee Benefits	$407,240.05	$66,925.12	$240,817.84	$166,422.21	$147,940.50	$18,481.71	4.54%
100.139.3000000.0000.000	Purchased Services	$21,463.81	$1,082.80	$4,284.37	$17,179.44	$0.00	$17,179.44	80.04%
100.139.4000000.0000.000	Supplies and Materials	$36,971.93	$1,977.55	$8,301.93	$28,670.00	$1,090.92	$27,579.08	74.59%
100.139.6000000.0000.000	Other Objects	$250.00	$0.00	$45.00	$205.00	$0.00	$205.00	82.00%
	FUNCTION: Early Childhood Programs - 139	$1,433,943.07	$231,417.35	$865,084.91	$568,858.16	$507,874.48	$60,983.68	4.25%
100.141.1000000.0000.000	Salaries	$1,271,017.88	$123,375.69	$626,599.53	$644,418.35	$371,858.80	$272,559.55	21.44%
100.141.2000000.0000.000	Employee Benefits	$485,133.49	$47,307.79	$230,740.33	$254,393.16	$136,142.59	$118,250.57	24.37%

Board Report Expenditures

Fiscal Year: 2015-2016

From Date: 2/1/2016 To Date: 3/31/2016

☐ Subtotal by Collapse Mask ☐ Include pre encumbrance ☐ Print accounts with zero balance ☑ Filter Encumbrance Detail by Date Range

☐ Exclude Inactive Accounts with zero balance

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.141.3000000.0000.000	Purchased Services	$3,060.00	$72.00	$2,301.00	$759.00	$0.00	$759.00	24.80%
100.141.4000000.0000.000	Supplies and Materials	$11,040.00	$1,053.00	$2,005.98	$9,034.02	$3,129.53	$5,904.49	53.48%
	FUNCTION: Gifted and Talented Academic - 141	$1,770,251.37	$171,808.48	$861,646.84	$908,604.53	$511,130.92	$397,473.61	22.45%
100.143.1000000.0000.000	Salaries	$355,953.61	$57,589.75	$215,886.02	$140,067.59	$130,147.20	$9,920.39	2.79%
100.143.2000000.0000.000	Employee Benefits	$125,461.75	$19,961.72	$74,372.16	$51,089.59	$45,251.83	$5,837.76	4.65%
	FUNCTION: Advanced Placement - 143	$481,415.36	$77,551.47	$290,258.18	$191,157.18	$175,399.03	$15,758.15	3.27%
100.145.1000000.0000.000	Salaries	$67,000.00	$38,537.24	$102,973.38	($35,973.38)	$8,196.20	($44,169.58)	-65.92%
100.145.2000000.0000.000	Employee Benefits	$17,000.00	$8,790.67	$22,856.03	($5,856.03)	$1,831.10	($7,687.13)	-45.22%
100.145.3000000.0000.000	Purchased Services	$16,000.00	$1,700.00	$3,325.00	$12,675.00	$0.00	$12,675.00	79.22%
	FUNCTION: Homebound - 145	$100,000.00	$49,027.91	$129,154.41	($29,154.41)	$10,027.30	($39,181.71)	-39.18%
100.148.1000000.0000.000	Salaries	$92,498.78	$41,939.58	$87,710.49	$4,788.29	$51,373.96	($46,585.67)	-50.36%
100.148.2000000.0000.000	Employee Benefits	$31,020.54	$14,837.96	$29,954.73	$1,065.81	$17,750.29	($16,684.48)	-53.79%
100.148.3000000.0000.000	Purchased Services	$4,245.00	$257.95	$353.95	$3,891.05	$0.00	$3,891.05	91.66%
100.148.4000000.0000.000	Supplies and Materials	$4,708.60	$42.62	$42.62	$4,665.98	$0.00	$4,665.98	99.09%
	FUNCTION: Gifted and Talented Artistic - 148	$132,472.92	$57,078.11	$118,061.79	$14,411.13	$69,124.25	($54,713.12)	-41.30%
100.149.1000000.0000.000	Salaries	$679,055.50	$97,333.06	$449,581.86	$229,473.64	$173,665.52	$55,808.12	8.22%
100.149.2000000.0000.000	Employee Benefits	$245,462.72	$37,774.05	$145,016.25	$100,446.47	$71,415.33	$29,031.14	11.83%
100.149.3000000.0000.000	Purchased Services	$0.00	$454,574.03	$1,352,625.49	($1,352,625.49)	$0.00	($1,352,625.49)	0.00%
	FUNCTION: Other Special Programs - 149	$924,518.22	$589,681.14	$1,947,223.60	($1,022,705.38)	$245,080.85	($1,267,786.23)	-137.13%
100.161.1000000.0000.000	Salaries	$929,053.00	$166,749.35	$609,737.74	$319,315.26	$347,581.77	($28,266.51)	-3.04%
100.161.2000000.0000.000	Employee Benefits	$382,966.16	$69,031.59	$246,807.64	$136,158.52	$147,732.46	($11,573.94)	-3.02%
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	$0.00	$1,022.72	$2,037.28	$99.00	$1,938.28	63.34%
	FUNCTION: Other Exceptional Programs - 161	$1,315,079.16	$235,780.94	$857,883.10	$457,196.06	$495,413.23	($38,217.17)	-2.91%
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	$35,404.64	$159,320.88	$53,107.12	$53,107.12	$0.00	0.00%
100.181.2000000.0000.000	Employee Benefits	$65,596.09	$10,313.20	$46,999.74	$18,596.35	$15,469.84	$3,126.51	4.77%
100.181.3000000.0000.000	Purchased Services	$5,000.00	$495.48	$1,271.21	$3,728.79	$0.00	$3,728.79	74.58%
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	$46,213.32	$208,032.83	$75,791.26	$68,576.96	$7,214.30	2.54%
100.182.3000000.0000.000	Purchased Services	$500.00	$16.00	$310.75	$189.25	$0.00	$189.25	37.85%
100.182.4000000.0000.000	Supplies and Materials	$7,130.00	$0.00	$5,598.32	$1,531.68	$333.00	$1,198.68	16.81%
	FUNCTION: Adult Secondary Education Programs - 182	$7,630.00	$16.00	$5,909.07	$1,720.93	$333.00	$1,387.93	18.19%
100.188.1000000.0000.000	Salaries	$0.00	$7,993.40	$31,973.60	($31,973.60)	$15,986.60	($47,960.20)	0.00%
100.188.2000000.0000.000	Employee Benefits	$0.00	$3,412.44	$13,491.23	($13,491.23)	$6,824.84	($20,316.07)	0.00%
	FUNCTION: Parenting/Family Literacy - 188	$0.00	$11,405.84	$45,464.83	($45,464.83)	$22,811.44	($68,276.27)	0.00%

Board Report Expenditures

From Date: 2/1/2016 To Date: 3/31/2016

Fiscal Year: 2015-2016

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Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.190.1000000.0000.000	Salaries	$538,977.00	$76,892.44	$295,366.53	$243,610.47	$163,543.83	$80,066.64	14.86%
100.190.2000000.0000.000	Employee Benefits	$124,107.00	$18,163.81	$70,046.49	$54,060.51	$39,434.10	$14,626.41	11.79%
100.190.6000000.0000.000	Other Objects	$20,800.00	$8,551.32	$15,065.18	$5,734.82	$1,260.34	$4,474.48	21.51%
	FUNCTION: Instrucational Pupil Activity - 190	$683,884.00	$103,607.57	$380,478.20	$303,405.80	$204,238.27	$99,167.53	14.50%
100.211.1000000.0000.000	Salaries	$834,655.00	$150,496.75	$597,200.93	$237,454.07	$304,439.17	($66,985.10)	-8.03%
100.211.2000000.0000.000	Employee Benefits	$367,537.45	$59,883.31	$232,307.42	$135,230.03	$125,103.77	$10,126.26	2.76%
100.211.3000000.0000.000	Purchased Services	$6,032.00	$1,020.46	$2,783.45	$3,248.55	$0.00	$3,248.55	53.86%
100.211.4000000.0000.000	Supplies and Materials	$1,858.00	$164.77	$468.56	$1,389.44	$477.23	$912.21	49.10%
	FUNCTION: Attendance and Social Work Services - 211	$1,210,082.45	$211,565.29	$832,760.36	$377,322.09	$430,020.17	($52,698.08)	-4.35%
100.212.1000000.0000.000	Salaries	$3,218,707.00	$528,933.09	$2,107,011.92	$1,111,695.08	$1,025,864.44	$85,830.64	2.67%
100.212.2000000.0000.000	Employee Benefits	$1,164,323.05	$184,480.34	$726,413.39	$437,909.66	$358,458.91	$79,450.75	6.82%
100.212.3000000.0000.000	Purchased Services	$2,560.50	$0.00	$1,362.77	$1,197.73	$0.00	$1,197.73	46.78%
100.212.4000000.0000.000	Supplies and Materials	$18,162.50	$838.14	$7,691.39	$10,471.11	$87.16	$10,383.95	57.17%
	FUNCTION: Guidance Services - 212	$4,403,753.05	$714,251.57	$2,842,479.47	$1,561,273.58	$1,384,410.51	$176,863.07	4.02%
100.213.1000000.0000.000	Salaries	$1,553,505.02	$260,653.90	$977,453.74	$576,051.28	$582,819.98	($6,768.70)	-0.44%
100.213.2000000.0000.000	Employee Benefits	$583,881.88	$96,270.34	$350,760.73	$233,121.15	$218,228.46	$14,892.69	2.55%
100.213.3000000.0000.000	Purchased Services	$3,000.00	$669.56	$881.32	$2,118.68	$0.00	$2,118.68	70.62%
100.213.4000000.0000.000	Supplies and Materials	$25,497.00	($15.08)	$12,055.07	$13,441.93	$0.00	$13,441.93	52.72%
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	$357,578.72	$1,341,260.86	$824,968.04	$801,048.44	$23,919.60	1.10%
100.214.1000000.0000.000	Salaries	$1,212,682.85	$190,982.52	$747,398.88	$465,283.97	$381,964.99	$83,318.98	6.87%
100.214.2000000.0000.000	Employee Benefits	$383,596.06	$60,595.77	$231,909.70	$151,686.36	$121,179.83	$30,506.53	7.95%
100.214.3000000.0000.000	Purchased Services	$6,000.00	$4,000.00	$4,000.00	$2,000.00	$0.00	$2,000.00	33.33%
100.214.4000000.0000.000	Supplies and Materials	$5,850.00	$0.00	$0.00	$5,850.00	$4,812.98	$1,037.02	17.73%
	FUNCTION: Psycological Services - 214	$1,608,128.91	$255,578.29	$983,308.58	$624,820.33	$507,957.80	$116,862.53	7.27%
100.217.1000000.0000.000	Salaries	$77,682.00	$12,946.96	$58,261.32	$19,420.68	$19,420.36	$0.32	0.00%
100.217.2000000.0000.000	Employee Benefits	$26,975.81	$4,517.00	$20,143.39	$6,832.42	$6,775.48	$56.94	0.21%
100.217.4000000.0000.000	Supplies and Materials	$1,095.00	$0.00	$200.74	$894.26	$0.00	$894.26	81.67%
	FUNCTION: Career Specialist Services - 217	$105,752.81	$17,463.96	$78,605.45	$27,147.36	$26,195.84	$951.52	0.90%
100.221.1000000.0000.000	Salaries	$2,089,965.10	$515,720.45	$2,143,706.83	($53,741.73)	$914,563.36	($968,305.09)	-46.33%
100.221.2000000.0000.000	Employee Benefits	$697,457.60	$164,242.92	$679,539.46	$17,918.14	$292,050.49	($274,132.35)	-39.30%
100.221.3000000.0000.000	Purchased Services	$582,672.00	$23,473.36	$265,736.64	$316,935.36	$52,561.75	$264,373.61	45.37%
100.221.4000000.0000.000	Supplies and Materials	$129,640.00	($378.92)	$54,709.09	$74,930.91	$453.58	$74,477.33	57.45%
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	$3,503,065.70	$703,057.81	$3,146,368.52	$356,697.18	$1,259,629.18	($902,932.00)	-25.78%
100.222.1000000.0000.000	Salaries	$1,743,924.50	$285,379.49	$1,083,463.14	$660,461.36	$647,260.21	$13,201.15	0.76%
100.222.2000000.0000.000	Employee Benefits	$693,795.04	$107,317.89	$398,721.20	$295,073.84	$246,892.14	$48,181.70	6.94%
100.222.3000000.0000.000	Purchased Services	$500.00	$131.00	$221.00	$279.00	$0.00	$279.00	55.80%
100.222.4000000.0000.000	Supplies and Materials	$253,443.00	$27,274.90	$140,116.74	$113,326.26	$26,304.74	$87,021.52	34.34%
100.222.6000000.0000.000	Other Objects	$0.00	$0.00	$175.00	($175.00)	$0.00	($175.00)	0.00%
	FUNCTION: Library and Media Services - 222	$2,691,662.54	$420,103.28	$1,622,697.08	$1,068,965.46	$920,457.09	$148,508.37	5.52%
100.223.1000000.0000.000	Salaries	$505,552.40	$89,288.16	$385,453.06	$120,099.34	$137,806.74	($17,707.40)	-3.50%
100.223.2000000.0000.000	Employee Benefits	$170,611.88	$29,460.49	$125,511.27	$45,100.61	$45,475.89	($375.28)	-0.22%

Board Report Expenditures

From Date: 2/1/2016 To Date: 3/31/2016

Fiscal Year: 2015-2016

☐ Subtotal by Collapse Mask ☐ Include pre encumbrance ☐ Print accounts with zero balance ☑ Filter Encumbrance Detail by Date Range

☐ Exclude Inactive Accounts with zero balance

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.223.3000000.0000.000	Purchased Services	$13,500.00	$1,132.36	$2,887.55	$10,612.45	$0.00	$10,612.45	78.61%
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	$690,204.28	$119,881.01	$514,027.38	$176,176.90	$183,282.63	($7,105.73)	-1.03%
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	$82,048.03	$9,092.97	$37,296.84	$44,751.19	$4,879.32	$39,871.87	48.60%
100.224.4000000.0000.000	Supplies and Materials	$8,435.50	$120.74	$2,532.06	$5,903.44	$0.00	$5,903.44	69.98%
	FUNCTION: Improvement of Instruction Inservice & Staff Train - 224	$90,483.53	$9,213.71	$41,832.89	$48,650.64	$4,879.32	$43,771.32	48.37%
100.231.1000000.0000.000	Salaries	$67,200.00	$9,600.00	$43,200.00	$24,000.00	$14,400.00	$9,600.00	14.29%
100.231.2000000.0000.000	Employee Benefits	$15,933.12	$2,307.84	$10,385.28	$5,547.84	$3,461.76	$2,086.08	13.09%
100.231.3000000.0000.000	Purchased Services	$330,275.00	$63,575.15	$271,013.14	$59,261.86	$12,750.00	$46,511.86	14.08%
100.231.6000000.0000.000	Other Objects	$367,225.00	$0.00	$368,135.00	($910.00)	$0.00	($910.00)	-0.25%
	FUNCTION: Board of Education - 231	$780,633.12	$75,482.99	$692,733.42	$87,899.70	$30,611.76	$57,287.94	7.34%
100.232.1000000.0000.000	Salaries	$264,398.00	$44,066.40	$199,492.20	$64,905.80	$66,099.60	($1,193.80)	-0.45%
100.232.2000000.0000.000	Employee Benefits	$77,125.38	$12,677.20	$53,960.22	$23,165.16	$19,015.80	$4,149.36	5.38%
100.232.3000000.0000.000	Purchased Services	$11,950.44	$4,303.46	$10,429.11	$1,521.33	$400.23	$1,121.10	9.38%
100.232.4000000.0000.000	Supplies and Materials	$6,723.00	($75.00)	$2,500.03	$4,222.97	$0.00	$4,222.97	62.81%
100.232.6000000.0000.000	Other Objects	$7,100.00	$0.00	$2,207.50	$4,892.50	$1,345.00	$3,547.50	49.96%
	FUNCTION: Office of Superintendent - 232	$367,296.82	$60,972.06	$268,589.06	$98,707.76	$86,860.63	$11,847.13	3.23%
100.233.1000000.0000.000	Salaries	$9,384,605.18	$1,412,850.33	$6,097,848.10	$3,286,757.08	$2,370,203.55	$916,553.53	9.77%
100.233.2000000.0000.000	Employee Benefits	$3,376,930.92	$498,628.43	$2,111,491.86	$1,265,439.06	$847,610.84	$417,828.22	12.37%
100.233.3000000.0000.000	Purchased Services	$189,098.93	$5,423.67	$62,196.96	$126,901.97	$6,188.94	$120,713.03	63.84%
100.233.4000000.0000.000	Supplies and Materials	$237,964.77	$16,022.96	$109,785.18	$128,179.59	$21,380.18	$106,799.41	44.88%
100.233.6000000.0000.000	Other Objects	$22,263.72	$569.83	$13,154.48	$9,109.24	$2,038.85	$7,070.39	31.76%
	FUNCTION: School Administration - 233	$13,210,863.52	$1,933,495.22	$8,394,476.58	$4,816,386.94	$3,247,422.36	$1,568,964.58	11.88%
100.251.3000000.0000.000	Purchased Services	$244,900.00	$65,079.40	$137,957.62	$106,942.38	$32,653.88	$74,288.50	30.33%
	FUNCTION: Student Transportation (Federal/District Mandated) - 251	$244,900.00	$65,079.40	$137,957.62	$106,942.38	$32,653.88	$74,288.50	30.33%
100.252.1000000.0000.000	Salaries	$773,981.00	$133,779.13	$612,997.31	$160,983.69	$184,920.34	($23,936.65)	-3.09%
100.252.2000000.0000.000	Employee Benefits	$280,957.52	$47,110.25	$212,485.80	$68,471.72	$65,557.16	$2,914.56	1.04%
100.252.3000000.0000.000	Purchased Services	$136,680.00	$10,070.62	$68,313.63	$68,366.37	$15,478.63	$52,887.74	38.69%
100.252.4000000.0000.000	Supplies and Materials	$53,955.00	$6,106.90	$14,622.59	$39,332.41	$7,102.42	$32,229.99	59.73%
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	$80.00	$1,968.00	$1,632.00	$0.00	$1,632.00	45.33%
	FUNCTION: Fiscal Services - 252	$1,255,423.52	$197,146.90	$910,387.33	$345,036.19	$273,058.55	$71,977.64	5.73%
100.254.1000000.0000.000	Salaries	$6,220,461.99	$967,487.37	$4,584,909.06	$1,635,552.93	$1,483,148.24	$152,404.69	2.45%
100.254.2000000.0000.000	Employee Benefits	$3,542,712.92	$640,400.24	$2,796,581.79	$746,131.13	$599,924.43	$146,206.70	4.13%
100.254.3000000.0000.000	Purchased Services	$4,555,827.90	$664,307.37	$3,509,926.96	$1,045,900.94	$666,876.73	$379,024.21	8.32%
100.254.4000000.0000.000	Supplies and Materials	$5,471,156.00	$875,231.66	$3,560,491.32	$1,910,664.68	$51,087.72	$1,859,576.96	33.99%
100.254.5000000.0000.000	Capital Outlay	$134,723.10	$0.00	$82,223.10	$52,500.00	$51,508.51	$991.49	0.74%
100.254.6000000.0000.000	Other Objects	$3,556.00	$1,653.00	$3,177.16	$378.84	$519.00	($140.16)	-3.94%
	FUNCTION: Operation and Maintenance of Plant - 254	$19,928,437.91	$3,149,079.64	$14,537,309.39	$5,391,128.52	$2,853,064.63	$2,538,063.89	12.74%
100.255.1000000.0000.000	Salaries	$3,133,318.23	$522,829.17	$2,107,937.32	$1,025,380.91	$1,016,606.97	$8,773.94	0.28%

School District Five of Lexington and Richland

Board Report Expenditures

From Date: 2/1/2016 To Date: 3/31/2016

Fiscal Year: 2015-2016

☐ Subtotal by Collapse Mask ☐ Include pre encumbrance ☐ Print accounts with zero balance ☑ Filter Encumbrance Detail by Date Range

☐ Exclude Inactive Accounts with zero balance

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
100.255.2000000.0000.000	Employee Benefits	$903,845.78	$200,074.54	$784,929.56	$118,916.22	$405,497.78	($286,581.56)	-31.71%
100.255.3000000.0000.000	Purchased Services	$109,223.15	$4,055.98	$56,134.00	$53,089.15	$15,183.22	$37,905.93	34.71%
100.255.4000000.0000.000	Supplies and Materials	$55,980.00	$3,737.03	$35,451.63	$20,528.37	$10,633.76	$9,894.61	17.68%
100.255.6000000.0000.000	Other Objects	$500.00	$0.00	$184.00	$316.00	$0.00	$316.00	63.20%
	FUNCTION: Student Transportation (State Mandated) - 255	$4,202,867.16	$730,696.72	$2,984,636.51	$1,218,230.65	$1,447,921.73	($229,691.08)	-5.47%
100.257.1000000.0000.000	Salaries	$251,822.40	$45,112.72	$181,618.28	$70,204.12	$67,669.07	$2,535.05	1.01%
100.257.2000000.0000.000	Employee Benefits	$94,460.36	$17,371.41	$64,273.89	$30,186.47	$24,309.13	$5,877.34	6.22%
100.257.3000000.0000.000	Purchased Services	$647,890.91	$77,408.50	$381,276.29	$266,614.62	$262,154.48	$4,460.14	0.69%
100.257.4000000.0000.000	Supplies and Materials	$52,639.00	$3,541.06	$27,092.34	$25,546.66	$4,352.06	$21,194.60	40.26%
	FUNCTION: Internal Services - 257	$1,046,812.67	$143,433.69	$654,260.80	$392,551.87	$358,484.74	$34,067.13	3.25%
100.258.1000000.0000.000	Salaries	$70,906.00	$12,517.20	$55,405.22	$15,500.78	$17,869.50	($2,368.72)	-3.34%
100.258.2000000.0000.000	Employee Benefits	$25,369.22	$4,414.19	$19,464.24	$5,904.98	$6,403.87	($498.89)	-1.97%
100.258.3000000.0000.000	Purchased Services	$1,236,054.71	$8,274.07	$708,582.90	$527,471.81	$619,012.94	($91,541.13)	-7.41%
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	$0.00	$34.22	$375.78	$0.00	$375.78	91.65%
	FUNCTION: Security - 258	$1,333,639.93	$25,205.46	$783,510.58	$550,129.35	$643,286.31	($93,156.96)	-6.99%
100.263.1000000.0000.000	Salaries	$846,763.61	$140,620.73	$631,839.43	$214,924.18	$194,554.37	$20,369.81	2.41%
100.263.2000000.0000.000	Employee Benefits	$281,878.80	$45,557.12	$195,804.14	$86,074.66	$61,961.40	$24,113.26	8.55%
100.263.3000000.0000.000	Purchased Services	$80,309.00	$3,645.79	$58,708.27	$21,600.73	$200.00	$21,400.73	26.65%
100.263.4000000.0000.000	Supplies and Materials	$33,146.00	$1,485.87	$12,149.45	$20,996.55	$2,359.54	$18,637.01	56.23%
100.263.6000000.0000.000	Other Objects	$12,700.00	$0.00	($1,196.11)	$13,896.11	$7,980.00	$5,916.11	46.58%
	FUNCTION: Information Services - 263	$1,254,797.41	$191,309.51	$897,305.18	$357,492.23	$267,055.31	$90,436.92	7.21%
100.264.1000000.0000.000	Salaries	$609,751.48	$117,546.69	$507,277.45	$102,474.03	$169,331.02	($66,856.99)	-10.96%
100.264.2000000.0000.000	Employee Benefits	$216,889.52	$42,408.38	$168,577.24	$48,312.28	$56,634.51	($8,322.23)	-3.84%
100.264.3000000.0000.000	Purchased Services	$78,744.00	$2,374.50	$10,405.64	$68,338.36	$3,463.00	$64,875.36	82.39%
100.264.4000000.0000.000	Supplies and Materials	$59,527.00	$4,506.89	$8,910.02	$50,616.98	$88.30	$50,528.68	84.88%
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	$166,836.46	$695,696.85	$269,215.15	$229,516.83	$39,698.32	4.11%
100.266.1000000.0000.000	Salaries	$1,477,028.48	$240,652.26	$1,081,744.55	$395,283.93	$403,039.66	($7,755.73)	-0.53%
100.266.2000000.0000.000	Employee Benefits	$580,847.52	$80,112.19	$357,911.27	$222,936.25	$135,083.61	$87,852.64	15.12%
100.266.3000000.0000.000	Purchased Services	$156,148.19	$15,699.16	$105,741.87	$50,406.32	$37,715.81	$12,690.51	8.13%
100.266.4000000.0000.000	Supplies and Materials	$13,919.31	$113.39	$13,133.54	$785.77	$0.00	$785.77	5.65%
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	$336,577.00	$1,558,706.73	$669,412.27	$575,839.08	$93,573.19	4.20%
100.271.1000000.0000.000	Salaries	$1,357,263.67	$264,115.56	$1,067,614.25	$289,649.42	$407,577.66	($117,928.24)	-8.69%
100.271.2000000.0000.000	Employee Benefits	$354,915.54	$62,764.09	$258,242.63	$96,672.91	$108,563.94	($11,891.03)	-3.35%
100.271.3000000.0000.000	Purchased Services	$55,824.00	$14,608.34	$187,894.60	($132,070.60)	$11,133.34	($143,203.94)	-256.53%
100.271.4000000.0000.000	Supplies and Materials	$30,100.00	$0.00	$0.00	$30,100.00	$0.00	$30,100.00	100.00%
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	$2,162,503.21	$341,487.99	$1,820,751.48	$341,751.73	$527,274.94	($185,523.21)	-8.58%
100.390.3000000.0000.000	Purchased Services	$17,500.00	$3,000.00	$10,500.00	$7,000.00	$4,500.00	$2,500.00	14.29%
100.390.4000000.0000.000	Supplies and Materials	$3,350.00	$0.00	$32.00	$3,318.00	$0.00	$3,318.00	99.04%
	FUNCTION: Other Community Services - 390	$20,850.00	$3,000.00	$10,532.00	$10,318.00	$4,500.00	$5,818.00	27.90%

Board Report Expenditures

Fiscal Year: 2015-2016

From Date: 2/1/2016 To Date: 3/31/2016

☐ Subtotal by Collapse Mask ☐ Include pre encumbrance ☐ Print accounts with zero balance ☑ Filter Encumbrance Detail by Date Range

☐ Exclude Inactive Accounts with zero balance

Account Number	Description	GL Budget	Range To Date	YTD	Balance	Encumbrance	Budget Balance	% Bud
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%
	Grand Total:	$166,224,350.75	$26,391,081.84	$106,936,796.52	$59,287,554.23	$51,060,759.30	$8,226,794.93	4.95%

End of Report

Exhibit C

EXHIBIT C

district five
OF LEXINGTON & RICHLAND COUNTIES

MEMORANDUM

TO: Members of the Board of Trustees

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

FROM: A. Len Richardson
Chief Finance Officer

DATE: April 20, 2016

RE: April 25, 2016 Board Meeting
Second and Final Reading Approval – Revisions to Board Policy " KBE-R"

Issue: Proposed revisions to Board Policy – Section K

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

- KBE-R – Relations with Parent Organizations

Recommendation: The administration recommends second and final reading approval of the proposed revisions to selected "K" policy.

LR/tl

Attachment/s – KBE-R – Relations with Parent Organizations – Section K

Proposed Administrative Rule – April 25, 2016

KBE-R – Relations with Parent Organizations

Support Organizations' Roles and Responsibilities:

An Extension of the School

Booster clubs and parent teacher organizations/associations are separate entities from the school district. The District Board appreciates the time, effort, energy and financial support these organizations provide to the staff and students of the District. As a result, the board encourages administration, staff and employees to support and accommodate the activities of these groups so much as they contribute to and provide benefit to the District. At the same time, the Board and management must ensure the District is complying with various laws and regulations. As such the District reserves the right to limit the activities of groups where necessary to ensure compliance with laws and regulations applicable to the District.

The board directs the administration to establish regulations and procedures which will provide for an orderly and systematic operation of such groups. The board further directs the administration periodically to evaluate the productivity and impact of the support groups (School District Policy KBE).

These valuable organizations provide a needed source of financial support for school activities. Without them, the district's schools would not be able to provide many of the opportunities that students enjoy through the programs supported by these organizations. Because these entities are independent from the district, a separation between these organizations and the school district must be maintained so that third parties are not misled into believing that an organization is part of the school district. This protects both parties in case of litigation and other issues that may arise. Therefore, it is important that consistent and proper accounting practices are followed in order to ensure this separation.

School support organizations are organized for the purpose of supporting schools or specific school programs within a school. The relationship with the school should never be forgotten. The mission, vision, and goals of the support organization should mesh with those of the school. For this reason, the support organization's officers and board should work closely with the school principal to establish an atmosphere of cooperation and confidence to ensure that the programs operate smoothly within the school's and district's policies and practices.

Establishing the School Support Organization

- Follow the School District Five of Lexington & Richland Counties' policies and administrative rules regarding support organizations and fundraising.
- Prepare and adopt bylaws and articles of incorporation.
- File a current copy of bylaws with the chief building administrator.
- File a current copy of bylaws with the district's Chief Finance Officer.
- Incorporate as a nonprofit organization, obtain the appropriate 501(c) designation and register with the South Carolina Secretary of State's Office.
- Prepare and approve a detailed proposed budget listing planned contributions to or support of school activities itemized by organization and activity.

Operating the School Support Organization

As separate entities, they have their own governing board, establish their own policies and maintain their own set of accounting records. Each one also must have its own checking account along with a separate federal tax identification number. These organizations are generally formed as nonprofit entities and therefore must follow applicable federal and state tax regulations. These organizations are neither authorized nor permitted to use the tax identification number of the district under any circumstances. If tax exempt status is desired, the organization must obtain its own tax exempt status, and comply with all applicable state and federal reporting requirements.

Each group shall file a statement of purpose and regulations governing the group's involvement to the superintendent, or his/her designee, for review and approval by the board on an annual basis on or before June 30 of each year in order to be authorized to work within the district in the following school year.

These support groups need administrative approval for any events, programs or operations that involve the following:

- the participation of children
- operation of a school service
- charges to children
- solicitation of children
- communications sent home with all children in a school
- use of any district facility or property

Management of Funds

A major initiative of most school support organizations is fundraising for school programs the organization represents. Guidelines are offered to serve to ensure funds are handled properly and therefore are available for the greatest benefit to students. No District employee shall serve in a financial capacity or as an officer of a booster or other parent organization or program.

The board has final authority over all phases of the school and money raised for schools. Equipment donated to the school becomes the property of the district (Policy KBE).

- Bonding insurance should be considered for officers.
- The Treasurer's Report, which should include a balance sheet and a statement of revenues and expenses, should be provided monthly to the membership but not less than annually. Cash receipt procedures should include best practices, including consistent and proper segregation of duties.
- Cash disbursement procedures should include best practices, including consistent and proper segregation of duties.
- Month end and year-end financial procedures should include best practices, including consistent and proper segregation of duties.
- The District reserves the right to accept or reject any contribution or use of booster funds should the District determine that the proposed use will negatively impact the District in any way.

Fundraising

All fund-raising activities that take place must be conducted by an organization, not an individual. Any club or organization requesting permission to hold a fundraiser must have a valid charter and board-approved bylaws and have been in existence for at least four months prior to making the request. The principal must approve the fund-raising activities of both parent and student-governed organizations. The approval must be in writing and issued prior to the beginning of the fund-raising activity.

Organizations must make written requests for fund-raising activities to include the following:

- the inclusive dates of the activity or sales campaign
- the type of activity clearly explained
- name of supplier of sales items or activity
- intended use of the money raised
- how this use of funds can improve the school or program

All information, advertising, tickets and other materials used for promotion of the activity must carry the name of the sponsoring club or organization. Organizations may not use the school board endorsement on any materials, notices or advertising without the specific written consent of the board.

No teacher or employee of the district will be required to participate in any fund-raising activity sponsored by a parent or student group such as, but not limited to, PTA/PTO, band boosters, etc. (Policy AR JJE-R).

Fiscal Year End Obligations

- Prepare a budget of anticipated expenditures and receipts for the new fiscal year prior to July 1st.
- Year-end financial reports shall be provided to the school principal and to the School District Five of Lexington & Richland Counties' Chief Finance Officer no later than September 30 of each year. The audit committee of the support organization must validate that the financial reports (balance sheet and revenue/expenditure statement) are an "accurate portrayal of the support organization's financial status." The audit committee must sign and date the financial reports to certify "that they had no financial duties and therefore can be independent in their judgment."
- File federal and state tax forms as required.

Exhibit D

EXHIBIT D

district five
OF LEXINGTON & RICHLAND COUNTIES

Memorandum

To: Members of the Board of Trustees

Through: Dr. Stephen W. Hefner
Superintendent

From: Mark A. Bounds MAB
Chief Information Officer

Date: April 25, 2016

Re: Request for Rezoning of "Shoals Landing" Property

The District received a request to modify attendance zone lines for a small parcel of land near the intersection of Dreher Shoal Road and Irmo Drive (attached). As currently planned, the proposed Shoals Landing development would be split between the Dutch Fork and Irmo attendance areas. The parcel is currently undeveloped. But, it is being proposed for development of approximately 162 single family homes.

The developer "would prefer all of the Shoals Landing's children to be able to attend the same school." The District agrees that when possible children residing in the same subdivision should attend the same cluster of schools. A review was conducted to determine the feasibility and impact of modifying the existing attendance lines as requested. The review determined that it was feasible and in the best interest of the District and future residents of Shoals Landing to recommend an attendance line modification. After careful consideration, it was determined that the Shoals Landing parcel should be zoned for the Irmo cluster. Several factors were key in this recommendation. First, the development is significantly closer to Irmo cluster schools.

Miles from site to Irmo Area Schools:		Miles from site to Dutch Fork Area Schools:	
to Irmo ES	1.9 miles	to H.E. Corley ES	2.9 miles
to Irmo MS	3.1 miles	to Dutch Fork MS	5.7 miles
to Irmo HS	3.3 miles	to Dutch Fork HS	5.9 miles

Second, Shoals Landing would be served most efficiently with buses executing routes in the Irmo cluster. Finally and most importantly, schools in the Irmo cluster have the capacity to increase their student populations while Dutch Fork Middle School and Dutch Fork High School are at or exceeding student capacity.

The developer requested that the subdivision be zoned for the Dutch Fork cluster indicating "Pulling everything into the Irmo Attendance Zones will significantly devalue our home values." However, the District stands behind its recommendation that the proposed Shoals Landing development be zoned for the Irmo cluster. A map of the current attendance line and proposed attendance line is attached for your review.

We have not received any comments or concerns on this recommendation since its discussion at the April 12, 2016 Board meeting.

MAB/csw

Attachments

- Initial request to modify existing attendance lines for the Shoals Landing development
- District Five response to the request to modify existing attendance lines for Shoals Landing
- Email requesting reconsideration of the District Five staff recommendation
- Map of the current attendance lines in the vicinity of the Shoals Landing property
- Map of the proposed modified attendance lines in the vicinity of the Shoals Landing property

BLAKE
WHITNEY THOMPSON CO.

February 4th, 2016

Board of Trustees
School District Five of Lexington and Richland Counties
1020 Dutch Fork Road
Irmo SC 29063

RE: Shoals Landing - Combination of Attendance Zones

Messrs and Mmes of the Board,

We would like to bring to your attention the development of our upcoming single family subdivision, Shoals Landing. The development will include a 162 homesites for purchase and construction of single family residential dwellings. The site is located near the intersection of Dreher Shoals Rd and Irmo Drive. We anticipate construction to commence mid to late March of 2016.

In our due diligence process, it was brought to our attention that our site resides in the award winning Lex/Richland 5 School District, however, the parcel is split in two different school attendance zones. Half of the property is zoned for Irmo High School and the other is zoned Dutch Fork High School. This has presented a challenge for our development team as we would prefer all of Shoals Landing's children to be able to attend the same school. It would not make sense for one child at the front of the neighborhood to have to attend a different school than his best friend who lives at the back of the neighborhood.

By way of this letter, we would like to request the consideration of the Board to combine our community's two school attendance zones into one Dutch Fork High School attendance zone.

We very much appreciate the Board's attention and consideration of this matter.

Sincerely,

BLAKE WHITNEY THOMPSON COMPANY

Robert E Wilder III

Robert Wilder
VP of Acquisitions

Cc: M. Bounds

Enclosures;
Community Site Plan
Parcel Survey

February 23, 2016

district five
OF LEXINGTON & RICHLAND COUNTIES

Mr. Robert Wilder
Blake-Whitney-Thompson Company
1941 Savage Rd.
Suite 100C
Charleston, SC 29407

Mr. Wilder,

We appreciate your forethought in recognizing that the Shoals Landing as planned would be split between two different school attendance zones. We agree that when possible neighborhoods should be zoned to the same school. This approach is best for the students, families and the school district. It is also best for everyone concerned that any attendance line adjustments be made prior to the sale of any homes.

We will move forward with a request to the School District Five of Lexington and Richland Counties, Board of Trustees to adjust the attendance line in the vicinity of the proposed Shoals Landing development. The adjusted line would ensure all homes in the Shoals Landing community attend the same attendance zone.

After careful consideration, we have determined that the attendance line should be adjusted so that all homes in the Shoals Landing community are in the Irmo attendance zone. Students in preK through 5th grade would be zoned to attend Irmo Elementary, 6th grade students could choose either CrossRoads Intermediate School or Irmo Midde School, 7th and 8th grade students would be zoned for Irmo Middle School and high school students would be zoned for Irmo High School, International School for the Arts.

It is important to note that District Five is a "Choice" district. Students and families can choose to attend a school outside their attendance zone provided the school has capacity to accept those students. This includes numerous magnet school options. This year, over 1,500 students requested a school other than their zoned school.

I will contact you with details on when this matter will be taken to the Board of Trustees for consideration. Please let me know if you have any questions or concerns.

Sincerely,

Mark A. Bounds
Chief Information Officer

district five gmail

Mark Bounds <mbounds@lexrich5.org>

Attendance Zones - Shoals Landing

1 message

Robert Wilder <rwilder@bwtcompany.com> Mon, Feb 29, 2016 at 9:41 AM
To: Mark Bounds <mbounds@lexrich5.org>

Mark,

I am in receipt of your letter. Thank you for your prompt response.

It is our intentions to have the property zoned for the Dutch Fork Attendance Zones. Pulling everything in to the Irmo Attendance Zones will significantly devalue our home values.

I would like to ask the Board to re-consider zoning Shoals Landing for the Dutch Fork Schools.

Thank you for your attention to this matter.

Sincerely,

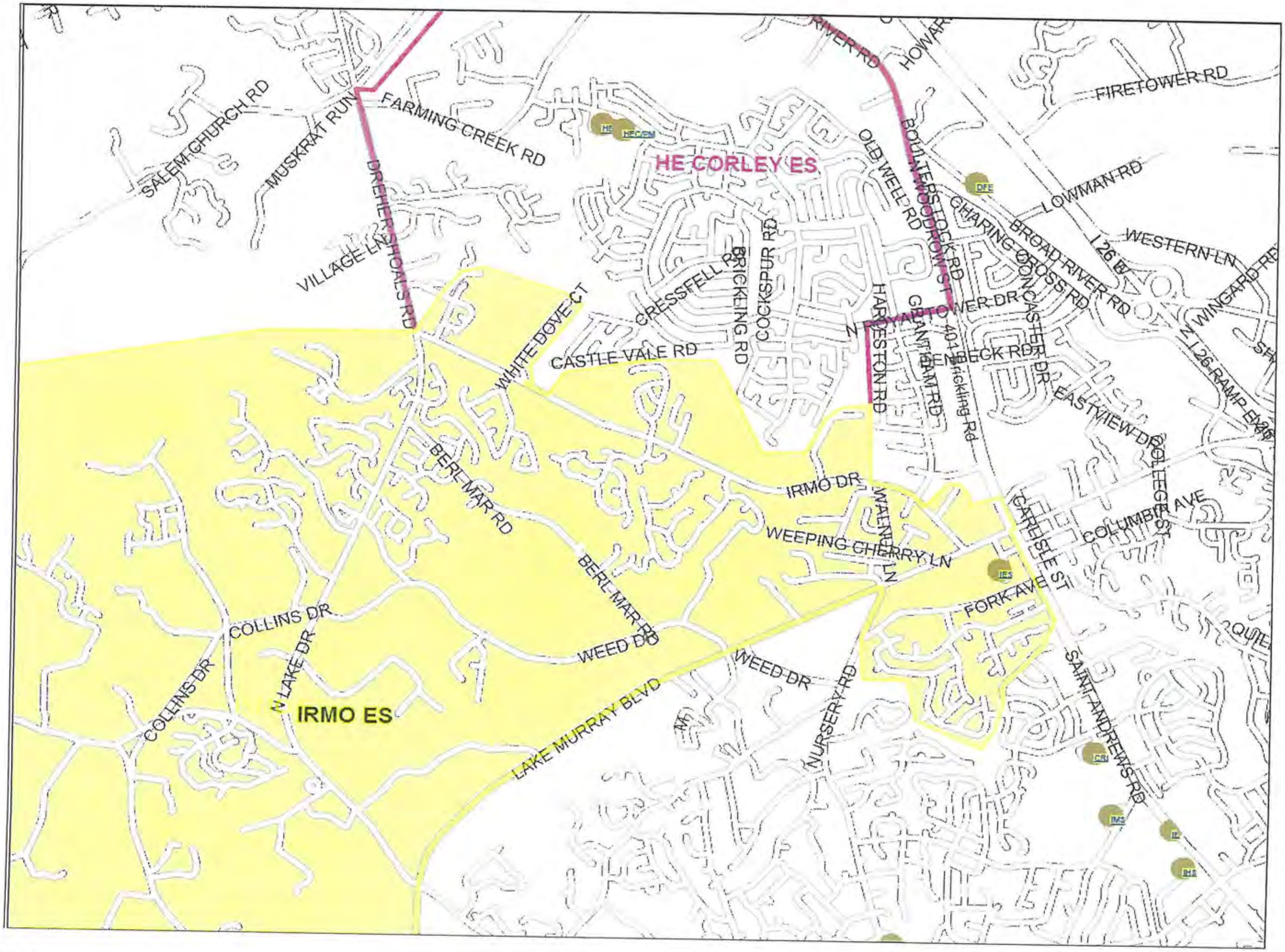
RW

--

Robert E Wilder III
SOUTH CAROLINA ACQUISITIONS
rwilder@BWTcompany.com
www.BWTcompany.com
803-309-3576

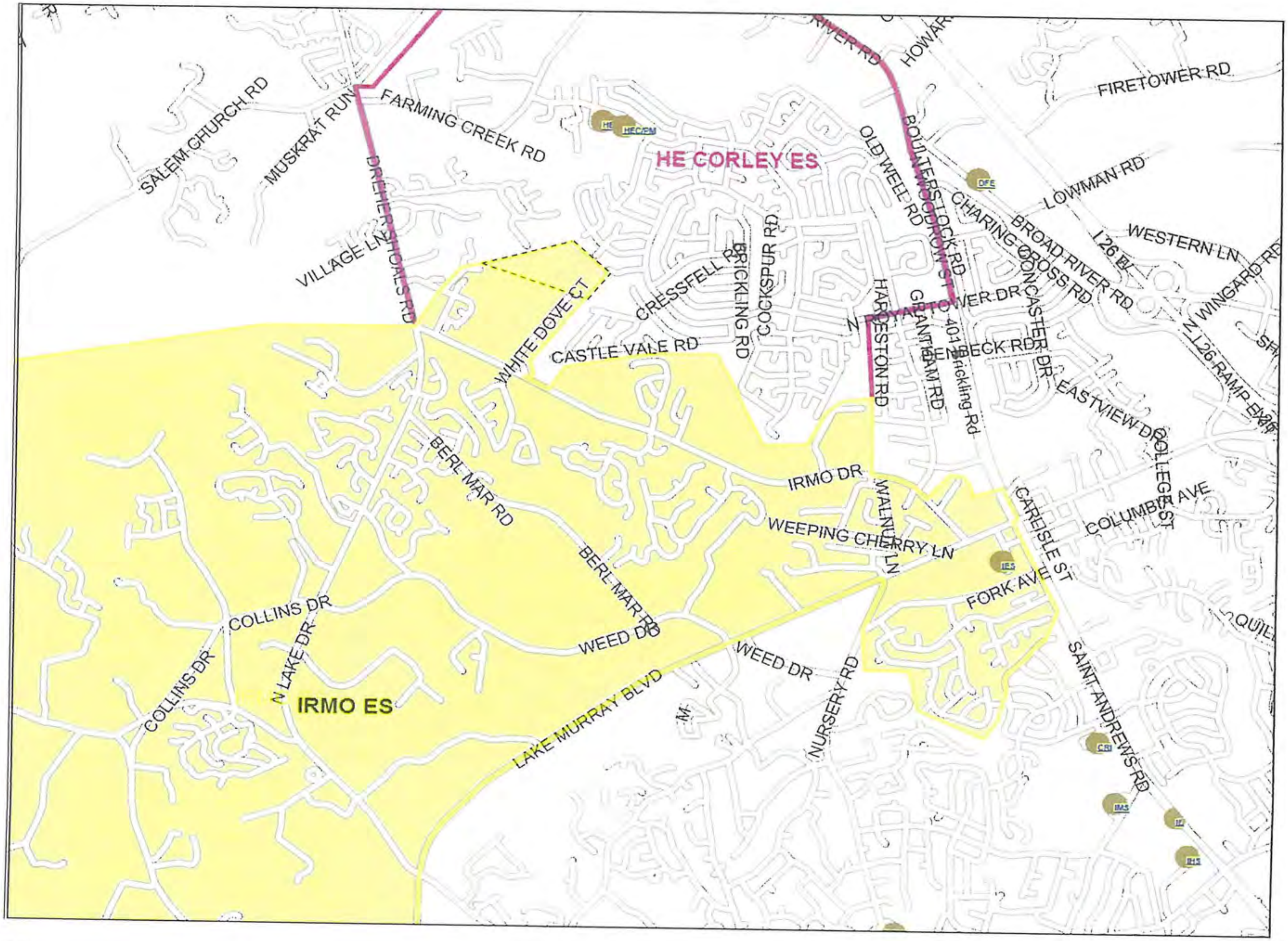
BLAKE
WHITNEY THOMPSON CO.

Current Irmo Elementary and H.E. Corley Elementary Boundaries



April 2016

Proposed Irmo Elementary and H.E. Corley Elementary Boundaries



April 2016

Exhibit E

EXHIBIT E

district five
OF LEXINGTON & RICHLAND COUNTIES

MEMORANDUM

To:	Members of the Board of Trustees Stephen Hefner, Ed.D., Superintendent
From:	A. Len Richardson Chief Finance Officer
Date:	April 20, 2016
Re:	Board Meeting – April 25, 2016 Discussion Reading - Proposed 2016-2017 General Fund Budget

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The proposed FY 2016-2017 General Fund Budget will be presented.

ALR:tl

Exhibit F

EXHIBIT F

district five
OF LEXINGTON & RICHLAND COUNTIES

Memorandum

To: Members of the Board of Trustees

Through: Dr. Stephen W. Hefner
Superintendent

From: Mark A. Bounds
Chief Information Officer

Date: April 25, 2016

South Carolina statute (Act 135 of 1993) requires each of the state's local School Improvement Councils (SICs) to publish and distribute a Report to Parents by April 30 of each year. The report highlights the progress the school is making in achieving the goals and objectives of the its five-year School Improvement Plan and the SIC's annual goals. This report is unique to each school and is developed by the SIC with input of the principal to share the challenges and successes of the school, students, parents, and teachers for the current school year.

All District Five schools have complied with the statutory requirement above. And, have provided valuable information about their schools to parents and the community. Schools have placed their Report to Parents on their school website and have hardcopies available in their front offices.

The Reports to Parents for all District Five schools are provided to the Board of Trustees for information.