***Agenda***

Board of Trustees
Regular Meeting
Location: Center for Advanced Technical Studies
Video Livestream: https://www.youtube.com/watch?v=rFLc6KzCuF8

March 27, 2023

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

2. Approval of the agenda

3. Enter Executive Session to consider the following:
   a. Selected employment items (Exhibit A) (Action)
   b. 2023-2024 Reappointments (Exhibit B) (Action)
   c. Selected employment items (Exhibit C) (Information Only)
   d. Contractual matter regarding Professional Development Services (Exhibit D)

4. Call to order and convene regular meeting at 7:00 p.m.

5. Welcoming remarks – Rebecca Blackburn Hines, Board Chair

6. Invocation – Mike Satterfield, Board of Trustees

7. Pledge of Allegiance – Mike Satterfield, Board of Trustees

8. School Board Spotlight

9. Superintendent's Report
   a. District FOCUS: Strategic Plan Update for 2022-2023 to 2026-2027
   b. Monthly Financial Update – January (Exhibit E)
   c. FY23-24 General Fund Budget Outlook
   d. South Carolina Child ID Kits

10. Approval of the minutes of the March 13, 2023, board meeting

11. Public Participation*

**ACTION AGENDA**

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

13. Second and Final Reading Approval of Proposed Revisions to Board Policy IE "Organization of Instruction" (Exhibit F)

14. Second and Final Reading Approval of New Board Policy GCLE "Unencumbered Time" (Exhibit G)

15. Approval of Proposed Revisions to 2016-2021 Capital Projects (Exhibit H)

**DISCUSSION AGENDA**

16. Discussion of Bond Resolutions for Spring Bond Issuance (Exhibit I)

17. Discussion of Strategic Plan Amendments for 2022-23 to 2026-27 (Exhibit J)

18. Adjourn

**INFORMATION AGENDA**

19. The next regular scheduled board meeting will be April 24, 2023, at the Center for Advanced Technical Studies.

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

Minutes/March 13, 2023

The Board of Trustees of School District Five of Lexington and Richland Counties met at the Center for Advanced Technical Studies with the following members present:

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

The following staff were in attendance:

Dr. Michael Harris, Chief of Student Services and Planning Officer
Mrs. Anna Miller, Chief of Academics and Administration Officer
Ms. Maddison Paul, Chief Financial Officer
Mrs. Amanda Taylor, Director of Communications
Dr. Tamara Turner, Chief Human Resources Officer (Absent)
Mr. Dave Weissman, Executive Director of Operations
Dr. Reggie Wicker, Director of Personnel

A livestream video link was provided to the public as a viewing option for the March 13, 2023, Finance Bond Workshop and Board Meeting.

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

Cathy Huddle, Board of Trustees, gave the Invocation and Pledge of Allegiance.

The Board conducted the School Board Spotlight.

During the Superintendent's Report, Dr. Ross presented and update on District FOCUS: Strategic Plan update for 2022-2023 to 2026-2027; Mrs. Anna Miller, Chief of Academics and Administration and Mrs. Sara Wheeler, Magnet Grant Project Director, presented a Magnet Programs update.

During public participation Beth Slice Bedenbaugh spoke about the district's book challenge policies.

The Board presented for discussion:

- CMTA (Guaranteed Energy Savings Contractor) Update
- Discussion of Proposed Revisions to 2016-2021 Capital Projects
- Discussion of Proposed District-Wide Social-Emotional Learning (SEL) Program

## Record of Voting

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

Meeting of March 13, 2023

| | | BARNHARDT | BLACKBURN HINES | HOGAN | HUDDLE | SATTERFIELD | SCULLY | SNIPES |
|---|---|---|---|---|---|---|---|---|
| 1. | M. Hogan S. Snipes<br>Adjourn Finance Bond Workshop at 4.50 p.m. | X | X | X | X | X | X | X |
| 2. | M. Hogan S. Huddle<br>Approve the agenda. | X | X | X | X | X | X | X |
| 3. | M. Hogan S. Huddle<br>I make the motion to enter executive session to consider the following: a.) Selected employment items (Exhibit A) (Action); b.) Selected employment items (Exhibit B) (Information Only; c.) Contractual matter regarding Social-Emotional Learning (SEL) (Exhibit C); d.) Legal advice regarding Town of Chapin Feasibility Study (Exhibit D); e.) Contractual matter regarding the RFQ for the Five-Year Master Facilities Study (Exhibit E); f.) Legal advice regarding construction defects at Chapin High School; g.) Legal advice regarding contractual matter. | X | X | X | X | X | X | X |
| 4. | M. Huddle S. Hogan<br>I move that we approve the minutes of the February 27, 2023, board meeting. | X | X | X | X | X | A | X |
| 5. | M. Huddle S. Hogan<br>I move that we approve the selected employment items as shown in Exhibit A for action. | 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 March 13, 2023

| | BARNHARDT | BLACKBURN HINES | HOGAN | HUDDLE | SATTERFIELD | SCULLY | SNIPES |
|---|---|---|---|---|---|---|---|
| 6. M. Huddle S. Scully<br>I move that we issue a solicitation for a social-emotional learning professional development program with the program content and final contract to be approved by the Board (Exhibit C). | N | X | X | X | X | X | X |
| 7. M. Huddle S. Barnhardt<br>I move that we approve the contract with McMillan Pazdan Smith Architecture for the Facilities Needs Assessment and advisory services for the Five-Year Master Facilities Plan (Exhibit E). | X | X | X | X | X | X | X |
| 8. M. Hogan S. Scully<br>I move that we approve First Reading of proposed revisions to Board Policy IE "Organization of Instruction" (Exhibit F). | X | X | X | X | X | X | AB |
| 9. M. Hogan S. Scully<br>I move that we approve First Reading of proposed revisions to Board Policy GCLE "Unencumbered Time" (Exhibit G). | X | X | X | X | X | X | X |
| 10. M. Hogan S. Barnhardt<br>Adjourn at 9:09 p.m. | X | X | X | X | X | X | X |

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EXHIBIT E

**MEMORANDUM**

To: Members of the Board of Trustees

From: Maddison Paul,
Chief Financial Officer

Date: March 23, 2023

Re: March 27, 2023 Board Meeting
Superintendent's Report
Monthly Financial Reports – January 2023

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Attached for your information are the revenue and expenditure reports through January 2023.

Attachments

# SCHOOL DISTRICT 5 OF LEXINGTON & RICHLAND COUNTIES
## GENERAL FUND
## MONTHLY REVENUE SUMMARY
## FOR THE PERIOD ENDING JANUARY 31, 2023

| | BUDGET | ACTUAL YEAR TO DATE | % Received | as of 1/31/2023 |
|---|---|---|---|---|
| **LOCAL SOURCES** | | | | |
| Property Taxes - Operations & Delinquent | **74,006,640** | **63,589,606** | 85.92% | **60,340,270** |
| Property Taxes - Penalties & Interest | **415,633** | **131,351** | 31.60% | **127,178** |
| Revenue in Lieu of Taxes (FILOT) | **1,316,061** | **122,179** | 9.28% | **-** |
| Tuition - Out of District | **5,000** | **275** | 5.50% | **2,651** |
| Rentals | **120,000** | **35,099** | 29.25% | **47,660** |
| Medicaid | **250,000** | **51,607** | 20.64% | **110,047** |
| Interest on Investments | **350,000** | **715,074** | 204.31% | **28,945** |
| Other Local Revenue | **285,000** | **111,866** | 39.25% | **202,102** |
| **TOTAL - LOCAL SOURCES** | 76,748,334 | 64,757,056 | 84.38% | 60,858,854 |
| **STATE SOURCES** | | | | |
| Education Finance Act (EFA) | **68,404,055** | **39,846,492** | 58.25% | **25,184,717** |
| State Fringe Benefits | **-** | **-** | | **11,979,029** |
| Retiree Health Insurance | **6,179,835** | **3,373,201** | 54.58% | **3,181,270** |
| State Aid to Classrooms - Teacher Salary | **-** | **-** | | **987,764** |
| Property Tax Relief - Tier I (1996: $100,000) | **10,580,071** | **9,522,064** | 90.00% | **9,522,064** |
| Homestead Exemption - Tier II (Seniors Age 65+) | **1,758,200** | **-** | 0.00% | **-** |
| Homestead Exemption - Tier III - (Act 388) | **34,332,638** | **13,733,055** | 40.00% | **13,335,512** |
| Merchant's Inventory Tax | **213,955** | **160,466** | 75.00% | **106,978** |
| School Bus Drivers' Salaries/Fringes | **1,482,722** | **566,646** | 38.22% | **648,130** |
| Manufacturer's Depr. Reimbursement & Motor Carrier | **572,460** | **241,987** | 42.27% | **219,381** |
| PEBA Credits | **1,190,410** | **1,192,418** | 100.17% | **1,191,338** |
| Other State Revenue | **-** | **13,956** | | **16,625** |
| Teacher Step | **-** | **-** | | **-** |
| **TOTAL - STATE SOURCES** | 124,714,346 | 68,650,285 | 55.05% | 66,372,809 |
| **OTHER FINANCING SOURCES** | | | | |
| E I A-State Aid to Classrooms | **11,849,288** | **6,987,281** | 58.97% | **3,144,443** |
| Indirect Cost - Special Revenue Funds | **400,000** | **184,380** | 46.09% | **185,132** |
| Sale of Fixed Assets | **-** | **15,717** | | **38,680** |
| **TOTAL OTHER FINANCING SOURCES** | 12,249,288 | 7,187,377 | 58.68% | 3,368,255 |
| **OPERATIONAL BALANCE TRANSFER** | | | | |
| **TOTAL REVENUES THROUGH 1/31/2023** | **$ 213,711,968** | **$ 140,594,718** | **65.79%** | |
| **TOTAL REVENUES THROUGH 1/31/2022** | **$ 204,968,206** | **$ 130,599,918** | **63.72%** | |

# SCHOOL DISTRICT 5 OF LEXINGTON & RICHLAND COUNTIES
## GENERAL FUND
## MONTHLY EXPENDITURE SUMMARY
## FOR THE PERIOD ENDING JANUARY 31, 2023

| | ORIGINAL BUDGET | ADJUSTED BUDGET | ACTUAL YEAR TO DATE | % Expended | as of 1/31/2023 |
|---|---|---|---|---|---|
| **SALARIES AND FRINGE** | | | | | |
| Instructional | $ 119,240,477 | $ 119,389,290 | $ 57,625,096 | 48.27% | 54,960,174 |
| Support & Community Services | 66,392,465 | 66,887,113 | 35,522,820 | 53.11% | 34,086,863 |
| **Subtotal** | 185,632,942 | 186,276,403 | 93,147,915 | 50.01% | 89,047,037 |
| **CONTRACTUAL SERVICES & Oth. Obj.** | | | | | |
| Instructional | 3,498,172 | 3,744,720 | 1,053,192 | 28.12% | 1,444,646 |
| Support & Community Services | 13,515,274 | 13,439,781 | 7,302,561 | 54.34% | 7,278,596 |
| **Subtotal** | 17,013,446 | 17,184,501 | 8,355,753 | 48.62% | 8,723,241 |
| **SUPPLIES AND MATERIALS** | | | | | |
| Instructional | 1,650,829 | 1,964,943 | 1,159,091 | 58.99% | 1,093,165 |
| Support & Community Services | 7,799,387 | 7,845,135 | 3,839,137 | 48.94% | 3,592,552 |
| **Subtotal** | 9,450,216 | 9,810,078 | 4,998,228 | 50.95% | 4,685,717 |
| **EQUIPMENT** | | | | | |
| Instructional | 440 | 7,440 | 6,900 | | 5,422 |
| Support & Community Services | 96,649 | 145,649 | 644,669 | 442.62% | 72,319 |
| **Subtotal** | 97,089 | 153,089 | 651,569 | 425.61% | 77,741 |
| **TRANSFERS** | | | | | |
| Pmts to Other Govt Entities-Per Proviso | 20,000 | 20,000 | 38,107 | 190.54% | 18,444 |
| Food Service | 267,897 | 267,897 | - | 0.00% | - |
| | 287,897 | 287,897 | 38,107 | 13.24% | 18,444 |
| **OPERATIONAL BALANCE** | | | | | |
| **TOTAL EXPENDITURES THROUGH 1/31/2023** | $ 212,481,590 | $ 213,711,968 | $ 107,191,573 | 50.16% | |
| **TOTAL EXPENDITURES THROUGH 1/31/2022** | $ 201,694,166 | $ 204,968,206 | $ 102,552,180 | 50.03% | |

# School District Five of Lexington and Richland

## Board Report Revenue

From Date: 7/1/2022 To Date: 1/31/2023

Fiscal Year: 2022-2023

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

☐ Exclude inactive accounts with zero balance

| Account Number | Description | Budget | Adjustments | GL Budget | Current | YTD | Balance | Encumbrance | Budget Bal | % Rem |
|---|---|---|---|---|---|---|---|---|---|---|
| 100.000.0111001.0000.000 | Ad Valorem Taxes - Lexington | ($37,848,007.00) | $0.00 | ($37,848,007.00) | ($37,406,583.77) | ($37,406,583.77) | ($441,423.23) | $0.00 | ($441,423.23) | 1.17% |
| 100.000.0111002.0000.000 | Ad Valorem Taxes - Richland | ($19,438,832.00) | $0.00 | ($19,438,832.00) | ($16,326,340.22) | ($16,326,340.22) | ($3,112,491.78) | $0.00 | ($3,112,491.78) | 16.01% |
| 100.000.0112001.0000.000 | Vehicle Taxes - Lexington | ($7,710,960.00) | $0.00 | ($7,710,960.00) | ($4,770,765.54) | ($4,770,765.54) | ($2,940,194.46) | $0.00 | ($2,940,194.46) | 38.13% |
| 100.000.0112002.0000.000 | Vehicle Taxes - Richland | ($7,200,512.00) | $0.00 | ($7,200,512.00) | ($4,370,686.22) | ($4,370,686.22) | ($2,829,825.78) | $0.00 | ($2,829,825.78) | 39.30% |
| 100.000.0113001.0000.000 | Delinquent Taxes - Lexington | ($963,839.00) | $0.00 | ($963,839.00) | ($352,741.78) | ($352,741.78) | ($611,097.22) | $0.00 | ($611,097.22) | 63.40% |
| 100.000.0113002.0000.000 | Delinquent Taxes - Richland | ($844,490.00) | $0.00 | ($844,490.00) | ($362,488.44) | ($362,488.44) | ($482,001.56) | $0.00 | ($482,001.56) | 57.08% |
| 100.000.0114001.0000.000 | Penalties & Interest on Taxes - Lexington | ($298,185.00) | $0.00 | ($298,185.00) | ($58,099.92) | ($58,099.92) | ($240,085.08) | $0.00 | ($240,085.08) | 80.52% |
| 100.000.0114002.0000.000 | Penalties & Interest on Taxes - Richland | ($117,448.00) | $0.00 | ($117,448.00) | ($73,251.05) | ($73,251.05) | ($44,196.95) | $0.00 | ($44,196.95) | 37.63% |
| 100.000.0115001.0000.000 | Sales & Use Tax Credit - Lexington | $0.00 | $0.00 | $0.00 | ($507.47) | ($507.47) | $507.47 | $0.00 | $507.47 | 0.00% |
| 100.000.0115002.0000.000 | Sales & Use Tax Credit - Richland | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0128001.0000.000 | Revenue in Lieu of Taxes - Lexington | ($1,316,061.00) | $0.00 | ($1,316,061.00) | ($122,178.59) | ($122,178.59) | ($1,193,882.41) | $0.00 | ($1,193,882.41) | 90.72% |
| 100.000.0128002.0000.000 | Revenue in Lieu of Taxes - Richland | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0131000.0000.000 | Student Tuition Out of District | ($5,000.00) | $0.00 | ($5,000.00) | ($275.00) | ($275.00) | ($4,725.00) | $0.00 | ($4,725.00) | 94.50% |
| 100.000.0132000.0000.000 | Tuition from Other LEAs for Regular Day School | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0151000.0000.000 | Interest on Investments | ($50,000.00) | $0.00 | ($50,000.00) | ($633,238.63) | ($633,238.63) | $583,238.63 | $0.00 | $583,238.63 | -1166.48% |
| 100.000.0151001.0000.000 | Interest - Lexington | $0.00 | $0.00 | $0.00 | ($81,820.84) | ($81,820.84) | $81,820.84 | $0.00 | $81,820.84 | 0.00% |
| 100.000.0151002.0000.000 | Interest - Richland County | $0.00 | $0.00 | $0.00 | ($14.29) | ($14.29) | $14.29 | $0.00 | $14.29 | 0.00% |
| 100.000.0174000.0000.000 | Student Fees | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0190000.0000.000 | Other Revenues from Local Sources | $0.00 | $0.00 | $0.00 | ($31,533.22) | ($31,533.22) | $31,533.22 | $0.00 | $31,533.22 | 0.00% |
| 100.000.0191000.0000.000 | Rentals | ($120,000.00) | $0.00 | ($120,000.00) | ($35,098.65) | ($35,098.65) | ($84,901.35) | $0.00 | ($84,901.35) | 70.75% |
| 100.000.0192000.0000.000 | Private Donations | $0.00 | $0.00 | $0.00 | ($250.00) | ($250.00) | $250.00 | $0.00 | $250.00 | 0.00% |
| 100.000.0193000.0000.000 | Medicaid | ($150,000.00) | $0.00 | ($150,000.00) | ($51,606.93) | ($51,606.93) | ($98,393.07) | $0.00 | ($98,393.07) | 65.60% |
| 100.000.0195000.0000.000 | Refund of Prior Year | ($45,000.00) | $0.00 | ($45,000.00) | ($988.76) | ($988.76) | ($44,011.24) | $0.00 | ($44,011.24) | 97.80% |
| 100.000.0196000.0000.000 | Printing Revenue | $0.00 | $0.00 | $0.00 | ($16,661.90) | ($16,661.90) | $16,661.90 | $0.00 | $16,661.90 | 0.00% |
| 100.000.0199200.0000.000 | E-Rate Revenue | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0199300.0000.000 | Insurance Proceeds | $0.00 | $0.00 | $0.00 | ($27,578.70) | ($27,578.70) | $27,578.70 | $0.00 | $27,578.70 | 0.00% |
| 100.000.0199400.0000.000 | Receipt of Legal Settlements | $0.00 | $0.00 | $0.00 | ($105.38) | ($105.38) | $105.38 | $0.00 | $105.38 | 0.00% |
| 100.000.0199900.0000.000 | Other Local Revenue | ($240,000.00) | $0.00 | ($240,000.00) | ($34,240.46) | ($34,240.46) | ($205,759.54) | $0.00 | ($205,759.54) | 85.73% |
| 100.000.0199901.0000.000 | Other Local Revenue - Lexington | $0.00 | $0.00 | $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 | $0.00 | 0.00% |
| 100.000.0199990.0000.000 | Operational Balance | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0199999.0000.000 | Operational Balance | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0310300.0000.000 | STATE AID TO CLASSROOMS | $0.00 | ($68,249,445.00) | ($68,249,445.00) | ($39,846,491.77) | ($39,846,491.77) | ($28,402,953.23) | $0.00 | ($28,402,953.23) | 41.62% |
| 100.000.0313100.0000.000 | SP Contracts | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |

# Board Report Revenue

Fiscal Year: 2022-2023

From Date: 7/1/2022 To Date: 1/31/2023

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

☐ Exclude inactive accounts with zero balance

| Account Number | Description | Budget | Adjustments | GL Budget | Current | YTD | Balance | Encumbrance | Budget Bal | % Rem |
|---|---|---|---|---|---|---|---|---|---|---|
| 100.000.0313200.0000.000 | Home Schooling | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0316000.0000.000 | School Bus Driver Salary | ($1,418,222.00) | $0.00 | ($1,418,222.00) | ($506,991.18) | ($506,991.18) | ($911,230.82) | $0.00 | ($911,230.82) | 64.25% |
| 100.000.0316100.0000.000 | EAA Bus Driver Salary and Fringe | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0316200.0000.000 | Workers Compensation School Bus Drivers | ($64,500.00) | $0.00 | ($64,500.00) | ($59,654.87) | ($59,654.87) | ($4,845.13) | $0.00 | ($4,845.13) | 7.51% |
| 100.000.0318000.0000.000 | State Fringe Benefits | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0318100.0000.000 | Retiree Health Insurance | ($6,179,835.00) | $0.00 | ($6,179,835.00) | ($3,373,201.40) | ($3,373,201.40) | ($2,806,633.60) | $0.00 | ($2,806,633.60) | 45.42% |
| 100.000.0318600.0000.000 | State Aid to Classroom - Teacher Salary | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0319900.0000.000 | State Other Scources | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0331000.0000.000 | EFA Full Time Programs | ($80,098,733.00) | $80,098,733.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0331100.0000.000 | EFA - Kindergarten | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0331200.0000.000 | EFA - Primary | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0331300.0000.000 | EFA - Elementary | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0331400.0000.000 | EFA - High School | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0331500.0000.000 | EFA - Trainable Mentally Handicapped | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0331600.0000.000 | EFA - Speech Handicapped | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0331700.0000.000 | EFA - Homebound | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0332100.0000.000 | EFA - Emotionally Handicapped | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0332200.0000.000 | EFA - Educable Mentally Handicapped | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0332300.0000.000 | EFA - Learning Disabilities | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0332400.0000.000 | EFA - Hearing Handicapped | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0332500.0000.000 | EFA - Visually Handicapped | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0332600.0000.000 | EFA - Orthopedically Handicapped | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0332700.0000.000 | EFA - Vocational | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0333100.0000.000 | EFA - Autism | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0333200.0000.000 | EFA - Gifted and Talented Education Pupils | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0333400.0000.000 | EFA - Limited English Proficiency | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0335100.0000.000 | EFA - Academic Assistance | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0335200.0000.000 | EFA - Pupils in Poverty | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0335300.0000.000 | EFA - DUAL | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0337500.0000.000 | EFA Education Foundation Supplement | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0339200.0000.000 | EFA - NBC Excess EFA Formula | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0381000.0000.000 | Local Property Tax Relief (Tier 1) | ($10,580,071.00) | $0.00 | ($10,580,071.00) | ($9,522,063.94) | ($9,522,063.94) | ($1,058,007.06) | $0.00 | ($1,058,007.06) | 10.00% |
| 100.000.0381002.0000.000 | Local Property Tax Relief (Tier 1) - Richland | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0382000.0000.000 | Homestead Exemption (Tier 2) | ($1,758,200.00) | $0.00 | ($1,758,200.00) | $0.00 | $0.00 | ($1,758,200.00) | $0.00 | ($1,758,200.00) | 100.00% |

# Board Report Revenue

Fiscal Year: 2022-2023

From Date: 7/1/2022 To Date: 1/31/2023

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

☐ Exclude inactive accounts with zero balance

| Account Number | Description | Budget | Adjustments | GL Budget | Current | YTD | Balance | Encumbrance | Budget Bal | % Rem |
|---|---|---|---|---|---|---|---|---|---|---|
| 100.000.0382002.0000.000 | Homestead Exemption (Tier 2) - Richland | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0382500.0000.000 | Property Tax Relief - Tier 3 | ($33,956,870.00) | $0.00 | ($33,956,870.00) | ($13,733,055.20) | ($13,733,055.20) | ($20,223,814.80) | $0.00 | ($20,223,814.80) | 59.56% |
| 100.000.0383001.0000.000 | Merchants Inventory Tax - Lexington | ($194,013.00) | $0.00 | ($194,013.00) | ($147,660.60) | ($147,660.60) | ($46,352.40) | $0.00 | ($46,352.40) | 23.89% |
| 100.000.0383002.0000.000 | Merchants Inventory Tax - Richland | ($19,942.00) | $0.00 | ($19,942.00) | ($12,805.74) | ($12,805.74) | ($7,136.26) | $0.00 | ($7,136.26) | 35.79% |
| 100.000.0384001.0000.000 | Manufacturers Depr. Reimbursement - Lexington | ($296,231.00) | $0.00 | ($296,231.00) | $0.00 | $0.00 | ($296,231.00) | $0.00 | ($296,231.00) | 100.00% |
| 100.000.0384002.0000.000 | Manufacturers Depr. Reimbursement - Richland | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0389001.0000.000 | Motor Carrier Vehicle Tax - Lexington | ($211,525.00) | $0.00 | ($211,525.00) | ($166,071.09) | ($166,071.09) | ($45,453.91) | $0.00 | ($45,453.91) | 21.49% |
| 100.000.0389002.0000.000 | Motor Carrier Vehicle Tax - Richland | ($64,704.00) | $0.00 | ($64,704.00) | ($75,915.94) | ($75,915.94) | $11,211.94 | $0.00 | $11,211.94 | -17.33% |
| 100.000.0390000.0000.000 | Other State Revenue | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0399000.0000.000 | Revenue from Other State Sources | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0399200.0000.000 | State Forest Commission Revenue | $0.00 | $0.00 | $0.00 | ($13,955.67) | ($13,955.67) | $13,955.67 | $0.00 | $13,955.67 | 0.00% |
| 100.000.0399300.0000.000 | PEBA On-behalf Payments | ($1,190,410.00) | $0.00 | ($1,190,410.00) | ($1,192,417.98) | ($1,192,417.98) | $2,007.98 | $0.00 | $2,007.98 | -0.17% |
| 100.000.0399900.0000.000 | Revenue from Other State Agency | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0499000.0000.000 | Other Federal Revenue | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0500000.0000.000 | Other Sources | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0520000.0000.000 | Interfund Transfers | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.000.0521000.0000.000 | Transfer from General Fund | $0.00 | $0.00 | $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 | $0.00 | 0.00% |
| 100.000.0523000.0000.000 | Transfer from EIA | $0.00 | ($11,849,288.00) | ($11,849,288.00) | ($6,987,280.66) | ($6,987,280.66) | ($4,862,007.34) | $0.00 | ($4,862,007.34) | 41.03% |
| 100.000.0525000.0000.000 | Transfer from Building Fund | $0.00 | $0.00 | $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 | $0.00 | 0.00% |
| 100.000.0528000.0000.000 | Transfer of Indirect Cost | ($100,000.00) | $0.00 | ($100,000.00) | ($184,379.97) | ($184,379.97) | $84,379.97 | $0.00 | $84,379.97 | -84.38% |
| 100.000.0530000.0000.000 | Sale of Fixed Assets | $0.00 | $0.00 | $0.00 | ($15,716.67) | ($15,716.67) | $15,716.67 | $0.00 | $15,716.67 | 0.00% |
| | FUND: General Fund - 100 | ($212,481,590.00) | $0.00 | ($212,481,590.00) | ($140,594,718.44) | ($140,594,718.44) | ($71,886,871.56) | $0.00 | ($71,886,871.56) | 33.83% |
| Grand Total: | | ($212,481,590.00) | $0.00 | ($212,481,590.00) | ($140,594,718.44) | ($140,594,718.44) | ($71,886,871.56) | $0.00 | ($71,886,871.56) | 33.83% |

End of Report

# Board Report Expenditures

From Date: 7/1/2022 To Date: 1/31/2023

Fiscal Year: 2022-2023

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

☐ Exclude inactive accounts with zero balance

| Account Number | Description | Budget | Adjustments | GL Budget | Current | YTD | Balance | Encumbrance | Budget Bal | % Rem |
|---|---|---|---|---|---|---|---|---|---|---|
| 100.111.1000000.0000.000 | Salaries | $4,924,704.00 | $0.00 | $4,924,704.00 | $2,369,953.10 | $2,369,953.10 | $2,554,750.90 | $2,663,293.18 | ($108,542.28) | -2.20% |
| 100.111.2000000.0000.000 | Employee Benefits | $2,414,734.00 | ($14,538.00) | $2,400,196.00 | $1,142,496.37 | $1,142,496.37 | $1,257,699.63 | $1,414,079.29 | ($156,379.66) | -6.52% |
| 100.111.3000000.0000.000 | Purchased Services | $55,640.00 | $0.00 | $55,640.00 | $182,031.35 | $182,031.35 | ($126,391.35) | $0.00 | ($126,391.35) | -227.16% |
| 100.111.4000000.0000.000 | Supplies and Materials | $43,614.00 | $15,337.00 | $58,951.00 | $35,754.57 | $35,754.57 | $23,196.43 | ($2,681.85) | $25,878.28 | 43.90% |
| | FUNCTION: Kindergarten Programs - 111 | $7,438,692.00 | $799.00 | $7,439,491.00 | $3,730,235.39 | $3,730,235.39 | $3,709,255.61 | $4,074,690.62 | ($365,435.01) | -4.91% |
| 100.112.1000000.0000.000 | Salaries | $14,337,596.00 | $0.00 | $14,337,596.00 | $6,928,510.81 | $6,928,510.81 | $7,409,085.19 | $7,659,099.57 | ($250,014.38) | -1.74% |
| 100.112.2000000.0000.000 | Employee Benefits | $6,497,026.00 | ($50,701.00) | $6,446,325.00 | $3,076,478.48 | $3,076,478.48 | $3,369,846.52 | $3,707,485.37 | ($337,638.85) | -5.24% |
| 100.112.3000000.0000.000 | Purchased Services | $136,263.00 | $0.00 | $136,263.00 | $174,128.90 | $174,128.90 | ($37,865.90) | $0.00 | ($37,865.90) | -27.79% |
| 100.112.4000000.0000.000 | Supplies and Materials | $213,052.00 | $50,900.50 | $263,952.50 | $148,519.55 | $148,519.55 | $115,432.95 | ($11,806.22) | $127,239.17 | 48.21% |
| 100.112.6000000.0000.000 | Other Objects | $0.00 | $799.50 | $799.50 | $3,299.50 | $3,299.50 | ($2,500.00) | $0.00 | ($2,500.00) | -312.70% |
| | FUNCTION: Primary Programs - 112 | $21,183,937.00 | $999.00 | $21,184,936.00 | $10,330,937.24 | $10,330,937.24 | $10,853,998.76 | $11,354,778.72 | ($500,779.96) | -2.36% |
| 100.113.1000000.0000.000 | Salaries | $24,719,297.00 | $0.00 | $24,719,297.00 | $11,648,916.23 | $11,648,916.23 | $13,070,380.77 | $13,063,305.87 | $7,074.90 | 0.03% |
| 100.113.2000000.0000.000 | Employee Benefits | $10,345,990.00 | ($85,256.00) | $10,260,734.00 | $5,154,783.65 | $5,154,783.65 | $5,105,950.35 | $6,233,814.85 | ($1,127,864.50) | -10.99% |
| 100.113.3000000.0000.000 | Purchased Services | $182,151.00 | $0.00 | $182,151.00 | $230,483.88 | $230,483.88 | ($48,332.88) | $30.00 | ($48,362.88) | -26.55% |
| 100.113.4000000.0000.000 | Supplies and Materials | $391,917.00 | $86,856.50 | $478,773.50 | $283,361.13 | $283,361.13 | $195,412.37 | ($14,435.74) | $209,848.11 | 43.83% |
| 100.113.6000000.0000.000 | Other Objects | $0.00 | $799.50 | $799.50 | $8,299.50 | $8,299.50 | ($7,500.00) | $0.00 | ($7,500.00) | -938.09% |
| | FUNCTION: Elementary Programs - 113 | $35,639,355.00 | $2,400.00 | $35,641,755.00 | $17,325,844.39 | $17,325,844.39 | $18,315,910.61 | $19,282,714.98 | ($966,804.37) | -2.71% |
| 100.114.1000000.0000.000 | Salaries | $19,688,552.00 | ($146,388.00) | $19,542,164.00 | $9,388,213.48 | $9,388,213.48 | $10,153,950.52 | $10,483,225.80 | ($329,275.28) | -1.68% |
| 100.114.2000000.0000.000 | Employee Benefits | $7,986,576.00 | $0.00 | $7,986,576.00 | $3,991,767.80 | $3,991,767.80 | $3,994,808.20 | $4,799,521.62 | ($804,713.42) | -10.08% |
| 100.114.3000000.0000.000 | Purchased Services | $285,312.00 | $0.00 | $285,312.00 | $200,549.06 | $200,549.06 | $84,762.94 | $46,831.74 | $37,931.20 | 13.29% |
| 100.114.4000000.0000.000 | Supplies and Materials | $554,466.00 | $135,989.00 | $690,455.00 | $371,728.32 | $371,728.32 | $318,726.68 | $17,343.03 | $301,383.65 | 43.65% |
| 100.114.5000000.0000.000 | Capital Outlay | $0.00 | $7,000.00 | $7,000.00 | $6,900.43 | $6,900.43 | $99.57 | $0.00 | $99.57 | 1.42% |
| 100.114.6000000.0000.000 | Other Objects | $0.00 | $0.00 | $0.00 | $4,287.99 | $4,287.99 | ($4,287.99) | $0.00 | ($4,287.99) | 0.00% |
| | FUNCTION: High School Programs - 114 | $28,514,906.00 | ($3,399.00) | $28,511,507.00 | $13,963,447.08 | $13,963,447.08 | $14,548,059.92 | $15,346,922.19 | ($798,862.27) | -2.80% |
| 100.115.1000000.0000.000 | Salaries | $2,903,401.00 | $0.00 | $2,903,401.00 | $1,435,688.45 | $1,435,688.45 | $1,467,712.55 | $1,502,778.53 | ($35,065.98) | -1.21% |
| 100.115.2000000.0000.000 | Employee Benefits | $1,252,695.00 | ($14,362.00) | $1,238,333.00 | $614,310.44 | $614,310.44 | $624,022.56 | $683,164.45 | ($59,141.89) | -4.78% |
| 100.115.3000000.0000.000 | Purchased Services | $28,888.00 | ($16,888.00) | $12,000.00 | $28,623.81 | $28,623.81 | ($16,623.81) | $5,564.32 | ($22,188.13) | -184.90% |
| 100.115.4000000.0000.000 | Supplies and Materials | $93,750.00 | $31,250.00 | $125,000.00 | $96,386.73 | $96,386.73 | $28,613.27 | $8,082.06 | $20,531.21 | 16.42% |
| INCTION: Career and Technology Education (Vocational) Prog - 115 | | $4,278,734.00 | $0.00 | $4,278,734.00 | $2,175,009.43 | $2,175,009.43 | $2,103,724.57 | $2,199,589.36 | ($95,864.79) | -2.24% |
| 100.118.1000000.0000.000 | Salaries | $307,492.00 | $0.00 | $307,492.00 | $178,349.71 | $178,349.71 | $129,142.29 | $196,441.71 | ($67,299.42) | -21.89% |
| 100.118.2000000.0000.000 | Employee Benefits | $173,602.00 | $0.00 | $173,602.00 | $92,270.51 | $92,270.51 | $81,331.49 | $112,930.64 | ($31,599.15) | -18.20% |
| 100.118.3000000.0000.000 | Purchased Services | $1,563.00 | $0.00 | $1,563.00 | $1,190.81 | $1,190.81 | $372.19 | $0.00 | $372.19 | 23.81% |
| 100.118.4000000.0000.000 | Supplies and Materials | $750.00 | $0.00 | $750.00 | $0.00 | $0.00 | $750.00 | $0.00 | $750.00 | 100.00% |

# Board Report Expenditures

Fiscal Year: 2022-2023

From Date: 7/1/2022 To Date: 1/31/2023

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

☐ Exclude inactive accounts with zero balance

| Account Number | Description | Budget | Adjustments | GL Budget | Current | YTD | Balance | Encumbrance | Budget Bal | % Rem |
|---|---|---|---|---|---|---|---|---|---|---|
| | FUNCTION: Montessori Programs - 118 | $483,407.00 | $0.00 | $483,407.00 | $271,811.03 | $271,811.03 | $211,595.97 | $309,372.35 | ($97,776.38) | -20.23% |
| 100.121.1000000.0000.000 | Salaries | $2,112,449.00 | $0.00 | $2,112,449.00 | $1,255,874.53 | $1,255,874.53 | $856,574.47 | $1,335,045.85 | ($478,471.38) | -22.65% |
| 100.121.2000000.0000.000 | Employee Benefits | $912,496.00 | $0.00 | $912,496.00 | $525,271.50 | $525,271.50 | $387,224.50 | $603,183.65 | ($215,959.15) | -23.67% |
| 100.121.3000000.0000.000 | Purchased Services | $125,000.00 | $0.00 | $125,000.00 | $23,686.75 | $23,686.75 | $101,313.25 | $0.00 | $101,313.25 | 81.05% |
| 100.121.4000000.0000.000 | Supplies and Materials | $1,937.00 | $0.00 | $1,937.00 | $55,135.24 | $55,135.24 | ($53,198.24) | $7,997.77 | ($61,196.01) | -3159.32% |
| | FUNCTION: Educable Mentally Handicapped - 121 | $3,151,882.00 | $0.00 | $3,151,882.00 | $1,859,968.02 | $1,859,968.02 | $1,291,913.98 | $1,946,227.27 | ($654,313.29) | -20.76% |
| 100.122.1000000.0000.000 | Salaries | $465,214.00 | $0.00 | $465,214.00 | $235,959.76 | $235,959.76 | $229,254.24 | $258,725.89 | ($29,471.65) | -6.34% |
| 100.122.2000000.0000.000 | Employee Benefits | $188,970.00 | $0.00 | $188,970.00 | $101,133.45 | $101,133.45 | $87,836.55 | $125,111.82 | ($37,275.27) | -19.73% |
| 100.122.3000000.0000.000 | Purchased Services | $750.00 | $0.00 | $750.00 | $1,922.51 | $1,922.51 | ($1,172.51) | $0.00 | ($1,172.51) | -156.33% |
| 100.122.4000000.0000.000 | Supplies and Materials | $1,998.00 | $0.00 | $1,998.00 | $3,285.22 | $3,285.22 | ($1,287.22) | ($257.74) | ($1,029.48) | -51.53% |
| 100.122.6000000.0000.000 | Other Objects | $0.00 | $0.00 | $0.00 | $2,500.00 | $2,500.00 | ($2,500.00) | $0.00 | ($2,500.00) | 0.00% |
| | FUNCTION: Trainable Mentally Handicapped - 122 | $656,932.00 | $0.00 | $656,932.00 | $344,800.94 | $344,800.94 | $312,131.06 | $383,579.97 | ($71,448.91) | -10.88% |
| 100.123.3000000.0000.000 | Purchased Services | $150.00 | $0.00 | $150.00 | $0.00 | $0.00 | $150.00 | $0.00 | $150.00 | 100.00% |
| 100.123.4000000.0000.000 | Supplies and Materials | $2,200.00 | $0.00 | $2,200.00 | $595.10 | $595.10 | $1,604.90 | ($249.51) | $1,854.41 | 84.29% |
| | FUNCTION: Orthopedically Handicapped - 123 | $2,350.00 | $0.00 | $2,350.00 | $595.10 | $595.10 | $1,754.90 | ($249.51) | $2,004.41 | 85.29% |
| 100.124.1000000.0000.000 | Salaries | $74,242.00 | $0.00 | $74,242.00 | $30,948.38 | $30,948.38 | $43,293.62 | $35,393.62 | $7,900.00 | 10.64% |
| 100.124.2000000.0000.000 | Employee Benefits | $30,335.00 | $0.00 | $30,335.00 | $11,948.96 | $11,948.96 | $18,386.04 | $14,312.44 | $4,073.60 | 13.43% |
| 100.124.4000000.0000.000 | Supplies and Materials | $2,020.00 | $0.00 | $2,020.00 | $175.97 | $175.97 | $1,844.03 | ($25.53) | $1,869.56 | 92.55% |
| | FUNCTION: Visually Handicapped - 124 | $106,597.00 | $0.00 | $106,597.00 | $43,073.31 | $43,073.31 | $63,523.69 | $49,680.53 | $13,843.16 | 12.99% |
| 100.125.1000000.0000.000 | Salaries | $264,827.00 | $0.00 | $264,827.00 | $118,999.95 | $118,999.95 | $145,827.05 | $134,727.04 | $11,100.01 | 4.19% |
| 100.125.2000000.0000.000 | Employee Benefits | $111,139.00 | $0.00 | $111,139.00 | $51,100.70 | $51,100.70 | $60,038.30 | $62,013.98 | ($1,975.68) | -1.78% |
| 100.125.3000000.0000.000 | Purchased Services | $68,500.00 | $0.00 | $68,500.00 | $84,713.26 | $84,713.26 | ($16,213.26) | $48,442.74 | ($64,656.00) | -94.39% |
| 100.125.4000000.0000.000 | Supplies and Materials | $4,037.00 | $0.00 | $4,037.00 | $507.05 | $507.05 | $3,529.95 | $0.00 | $3,529.95 | 87.44% |
| | FUNCTION: Hearing Handicapped - 125 | $448,503.00 | $0.00 | $448,503.00 | $255,320.96 | $255,320.96 | $193,182.04 | $245,183.76 | ($52,001.72) | -11.59% |
| 100.126.1000000.0000.000 | Salaries | $1,773,716.00 | $0.00 | $1,773,716.00 | $912,821.61 | $912,821.61 | $860,894.39 | $1,024,130.38 | ($163,235.99) | -9.20% |
| 100.126.2000000.0000.000 | Employee Benefits | $744,068.00 | $0.00 | $744,068.00 | $393,075.24 | $393,075.24 | $350,992.76 | $476,602.47 | ($125,609.71) | -16.88% |
| 100.126.3000000.0000.000 | Purchased Services | $431,815.00 | $0.00 | $431,815.00 | $0.00 | $0.00 | $431,815.00 | $0.00 | $431,815.00 | 100.00% |
| 100.126.4000000.0000.000 | Supplies and Materials | $90,395.00 | $0.00 | $90,395.00 | $36,942.34 | $36,942.34 | $53,452.66 | ($459.34) | $53,912.00 | 59.64% |
| | FUNCTION: Speech Handicapped - 126 | $3,039,994.00 | $0.00 | $3,039,994.00 | $1,342,839.19 | $1,342,839.19 | $1,697,154.81 | $1,500,273.51 | $196,881.30 | 6.48% |
| 100.127.1000000.0000.000 | Salaries | $4,130,498.00 | $0.00 | $4,130,498.00 | $2,021,608.91 | $2,021,608.91 | $2,108,889.09 | $2,260,457.40 | ($151,568.31) | -3.67% |
| 100.127.2000000.0000.000 | Employee Benefits | $1,707,325.00 | $0.00 | $1,707,325.00 | $881,192.99 | $881,192.99 | $826,132.01 | $1,067,408.76 | ($241,276.75) | -14.13% |
| 100.127.3000000.0000.000 | Purchased Services | $48,790.00 | $0.00 | $48,790.00 | $10,111.89 | $10,111.89 | $38,678.11 | $0.00 | $38,678.11 | 79.27% |

# Board Report Expenditures

From Date: 7/1/2022 To Date: 1/31/2023

Fiscal Year: 2022-2023 ☐ Include pre encumbrance ☐ Print accounts with zero balance ☑ Filter Encumbrance Detail by Date Range

☐ Exclude inactive accounts with zero balance

| Account Number | Description | Budget | Adjustments | GL Budget | Current | YTD | Balance | Encumbrance | Budget Bal | % Rem |
|---|---|---|---|---|---|---|---|---|---|---|
| 100.127.4000000.0000.000 | Supplies and Materials | $117,354.00 | $0.00 | $117,354.00 | $88,747.39 | $88,747.39 | $28,606.61 | $758.29 | $27,848.32 | 23.73% |
| 100.127.6000000.0000.000 | Other Objects | $0.00 | $0.00 | $0.00 | $5,000.00 | $5,000.00 | ($5,000.00) | $0.00 | ($5,000.00) | 0.00% |
| FUNCTION: Learning Disabilities - 127 | | $6,003,967.00 | $0.00 | $6,003,967.00 | $3,006,661.18 | $3,006,661.18 | $2,997,305.82 | $3,328,624.45 | ($331,318.63) | -5.52% |
| 100.128.1000000.0000.000 | Salaries | $627,308.00 | $0.00 | $627,308.00 | $209,479.93 | $209,479.93 | $417,828.07 | $233,683.64 | $184,144.43 | 29.35% |
| 100.128.2000000.0000.000 | Employee Benefits | $300,165.00 | $0.00 | $300,165.00 | $92,014.99 | $92,014.99 | $208,150.01 | $112,089.99 | $96,060.02 | 32.00% |
| 100.128.3000000.0000.000 | Purchased Services | $6,500.00 | $0.00 | $6,500.00 | $2,129.70 | $2,129.70 | $4,370.30 | $0.00 | $4,370.30 | 67.24% |
| 100.128.4000000.0000.000 | Supplies and Materials | $3,951.00 | $0.00 | $3,951.00 | $2,839.09 | $2,839.09 | $1,111.91 | ($154.34) | $1,266.25 | 32.05% |
| FUNCTION: Emotionally Handicapped - 128 | | $937,924.00 | $0.00 | $937,924.00 | $306,463.71 | $306,463.71 | $631,460.29 | $345,619.29 | $285,841.00 | 30.48% |
| 100.129.1000000.0000.000 | Salaries | $644,741.00 | $0.00 | $644,741.00 | $371,578.19 | $371,578.19 | $273,162.81 | $383,903.33 | ($110,740.52) | -17.18% |
| 100.129.2000000.0000.000 | Employee Benefits | $300,081.00 | $0.00 | $300,081.00 | $165,388.15 | $165,388.15 | $134,692.85 | $183,324.79 | ($48,631.94) | -16.21% |
| 100.129.3000000.0000.000 | Purchased Services | $6,918.00 | $0.00 | $6,918.00 | $0.00 | $0.00 | $6,918.00 | $0.00 | $6,918.00 | 100.00% |
| 100.129.4000000.0000.000 | Supplies and Materials | $1,500.00 | $0.00 | $1,500.00 | $0.00 | $0.00 | $1,500.00 | $0.00 | $1,500.00 | 100.00% |
| FUNCTION: Coordinated Early Intervening Services (CEIS) - 129 | | $953,240.00 | $0.00 | $953,240.00 | $536,966.34 | $536,966.34 | $416,273.66 | $567,228.12 | ($150,954.46) | -15.84% |
| 100.135.1000000.0000.000 | Salaries | $2,500.00 | $0.00 | $2,500.00 | $1,300.00 | $1,300.00 | $1,200.00 | $0.00 | $1,200.00 | 48.00% |
| 100.135.2000000.0000.000 | Employee Benefits | $200.00 | $0.00 | $200.00 | $104.98 | $104.98 | $95.02 | $0.00 | $95.02 | 47.51% |
| 100.135.4000000.0000.000 | Supplies and Materials | $100.00 | $0.00 | $100.00 | $0.00 | $0.00 | $100.00 | $0.00 | $100.00 | 100.00% |
| JNCTION: Preschool Handicapped Speech (3 and 4 year olds) - 135 | | $2,800.00 | $0.00 | $2,800.00 | $1,404.98 | $1,404.98 | $1,395.02 | $0.00 | $1,395.02 | 49.82% |
| 100.136.1000000.0000.000 | Salaries | $7,940.00 | $0.00 | $7,940.00 | $2,125.48 | $2,125.48 | $5,814.52 | $1,783.77 | $4,030.75 | 50.77% |
| 100.136.2000000.0000.000 | Employee Benefits | $2,536.00 | $0.00 | $2,536.00 | $874.71 | $874.71 | $1,661.29 | $1,025.84 | $635.45 | 25.06% |
| 100.136.3000000.0000.000 | Purchased Services | $750.00 | $0.00 | $750.00 | $35,308.48 | $35,308.48 | ($34,558.48) | $0.00 | ($34,558.48) | -4607.80% |
| 100.136.4000000.0000.000 | Supplies and Materials | $400.00 | $0.00 | $400.00 | $0.00 | $0.00 | $400.00 | $0.00 | $400.00 | 100.00% |
| FUNCTION: Preschool Handicapped Itinerant (3 and 4 yr olds) - 136 | | $11,626.00 | $0.00 | $11,626.00 | $38,308.67 | $38,308.67 | ($26,682.67) | $2,809.61 | ($29,492.28) | -253.68% |
| 100.137.1000000.0000.000 | Salaries | $1,118,233.00 | $0.00 | $1,118,233.00 | $551,703.47 | $551,703.47 | $566,529.53 | $572,798.13 | ($6,268.60) | -0.56% |
| 100.137.2000000.0000.000 | Employee Benefits | $526,651.00 | $0.00 | $526,651.00 | $252,351.72 | $252,351.72 | $274,299.28 | $289,304.16 | ($15,004.88) | -2.85% |
| 100.137.3000000.0000.000 | Purchased Services | $30,474.00 | $0.00 | $30,474.00 | $4,300.22 | $4,300.22 | $26,173.78 | $0.00 | $26,173.78 | 85.89% |
| 100.137.4000000.0000.000 | Supplies and Materials | $540.00 | $0.00 | $540.00 | $0.00 | $0.00 | $540.00 | $0.00 | $540.00 | 100.00% |
| INCTION: Preschool Handicapped Self Contained (3 &4 yr old) - 137 | | $1,675,898.00 | $0.00 | $1,675,898.00 | $808,355.41 | $808,355.41 | $867,542.59 | $862,102.29 | $5,440.30 | 0.32% |
| 100.138.1000000.0000.000 | Salaries | $2,390.00 | $0.00 | $2,390.00 | $1,059.61 | $1,059.61 | $1,330.39 | $657.06 | $673.33 | 28.17% |
| 100.138.2000000.0000.000 | Employee Benefits | $1,036.00 | $0.00 | $1,036.00 | $443.75 | $443.75 | $592.25 | $32.81 | $559.44 | 54.00% |
| UNCTION: Preschool Handicapped Homebased (3 & 4 yr olds) - 138 | | $3,426.00 | $0.00 | $3,426.00 | $1,503.36 | $1,503.36 | $1,922.64 | $689.87 | $1,232.77 | 35.98% |
| 100.139.1000000.0000.000 | Salaries | $1,145,599.00 | $0.00 | $1,145,599.00 | $517,959.16 | $517,959.16 | $627,639.84 | $550,363.47 | $77,276.37 | 6.75% |
| 100.139.2000000.0000.000 | Employee Benefits | $524,703.00 | $0.00 | $524,703.00 | $240,739.13 | $240,739.13 | $283,963.87 | $285,819.87 | ($1,856.00) | -0.35% |

# Board Report Expenditures

From Date: 7/1/2022 To Date: 1/31/2023

Fiscal Year: 2022-2023

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

☐ Exclude inactive accounts with zero balance

| Account Number | Description | Budget | Adjustments | GL Budget | Current | YTD | Balance | Encumbrance | Budget Bal | % Rem |
|---|---|---|---|---|---|---|---|---|---|---|
| 100.139.3000000.0000.000 | Purchased Services | $26,258.00 | ($3,400.00) | $22,858.00 | $11,425.74 | $11,425.74 | $11,432.26 | $718.00 | $10,714.26 | 46.87% |
| 100.139.4000000.0000.000 | Supplies and Materials | $21,851.00 | $3,400.00 | $25,251.00 | $20,172.87 | $20,172.87 | $5,078.13 | ($598.37) | $5,676.50 | 22.48% |
| 100.139.6000000.0000.000 | Other Objects | $3,500.00 | $0.00 | $3,500.00 | $424.00 | $424.00 | $3,076.00 | ($50.00) | $3,126.00 | 89.31% |
| | FUNCTION: Early Childhood Programs - 139 | $1,721,911.00 | $0.00 | $1,721,911.00 | $790,720.90 | $790,720.90 | $931,190.10 | $836,252.97 | $94,937.13 | 5.51% |
| 100.141.1000000.0000.000 | Salaries | $1,114,330.00 | $0.00 | $1,114,330.00 | $469,124.26 | $469,124.26 | $645,205.74 | $532,839.59 | $112,366.15 | 10.08% |
| 100.141.2000000.0000.000 | Employee Benefits | $494,745.00 | $0.00 | $494,745.00 | $199,275.84 | $199,275.84 | $295,469.16 | $244,962.16 | $50,507.00 | 10.21% |
| 100.141.3000000.0000.000 | Purchased Services | $6,650.00 | $100.00 | $6,750.00 | $4,587.86 | $4,587.86 | $2,162.14 | $0.00 | $2,162.14 | 32.03% |
| 100.141.4000000.0000.000 | Supplies and Materials | $12,725.00 | ($469.00) | $12,256.00 | $2,479.29 | $2,479.29 | $9,776.71 | ($167.90) | $9,944.61 | 81.14% |
| 100.141.6000000.0000.000 | Other Objects | $0.00 | $369.00 | $369.00 | $369.00 | $369.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| | FUNCTION: Gifted and Talented Academic - 141 | $1,628,450.00 | $0.00 | $1,628,450.00 | $675,836.25 | $675,836.25 | $952,613.75 | $777,633.85 | $174,979.90 | 10.75% |
| 100.143.1000000.0000.000 | Salaries | $254,537.00 | $0.00 | $254,537.00 | $93,656.39 | $93,656.39 | $160,880.61 | $107,529.51 | $53,351.10 | 20.96% |
| 100.143.2000000.0000.000 | Employee Benefits | $110,435.00 | $0.00 | $110,435.00 | $38,156.61 | $38,156.61 | $72,278.39 | $46,257.44 | $26,020.95 | 23.56% |
| 100.143.3000000.0000.000 | Purchased Services | $750.00 | $0.00 | $750.00 | $0.00 | $0.00 | $750.00 | $0.00 | $750.00 | 100.00% |
| 100.143.4000000.0000.000 | Supplies and Materials | $250.00 | $0.00 | $250.00 | $0.00 | $0.00 | $250.00 | $0.00 | $250.00 | 100.00% |
| | FUNCTION: Advanced Placement - 143 | $365,972.00 | $0.00 | $365,972.00 | $131,813.00 | $131,813.00 | $234,159.00 | $153,786.95 | $80,372.05 | 21.96% |
| 100.144.3000000.0000.000 | Purchased Services | $10,000.00 | $0.00 | $10,000.00 | $7,306.58 | $7,306.58 | $2,693.42 | $0.00 | $2,693.42 | 26.93% |
| 100.144.4000000.0000.000 | Supplies and Materials | $50,000.00 | ($11,650.00) | $38,350.00 | $2,363.01 | $2,363.01 | $35,986.99 | ($90.02) | $36,077.01 | 94.07% |
| 100.144.6000000.0000.000 | Other Objects | $0.00 | $11,650.00 | $11,650.00 | $12,090.00 | $12,090.00 | ($440.00) | $0.00 | ($440.00) | -3.78% |
| | FUNCTION: International Baccalaureate - 144 | $60,000.00 | $0.00 | $60,000.00 | $21,759.59 | $21,759.59 | $38,240.41 | ($90.02) | $38,330.43 | 63.88% |
| 100.145.1000000.0000.000 | Salaries | $71,289.00 | $0.00 | $71,289.00 | $25,175.75 | $25,175.75 | $46,113.25 | $18,737.50 | $27,375.75 | 38.40% |
| 100.145.2000000.0000.000 | Employee Benefits | $22,189.00 | $0.00 | $22,189.00 | $8,982.27 | $8,982.27 | $13,206.73 | $6,416.82 | $6,789.91 | 30.60% |
| 100.145.3000000.0000.000 | Purchased Services | $6,000.00 | $0.00 | $6,000.00 | $1,650.00 | $1,650.00 | $4,350.00 | $6,125.00 | ($1,775.00) | -29.58% |
| | FUNCTION: Homebound - 145 | $99,478.00 | $0.00 | $99,478.00 | $35,808.02 | $35,808.02 | $63,669.98 | $31,279.32 | $32,390.66 | 32.56% |
| 100.147.1000000.0000.000 | Salaries | $100,000.00 | $0.00 | $100,000.00 | $0.00 | $0.00 | $100,000.00 | $0.00 | $100,000.00 | 100.00% |
| 100.147.2000000.0000.000 | Employee Benefits | $50,000.00 | $0.00 | $50,000.00 | $0.00 | $0.00 | $50,000.00 | $0.00 | $50,000.00 | 100.00% |
| | FUNCTION: Full Day 4K - 147 | $150,000.00 | $0.00 | $150,000.00 | $0.00 | $0.00 | $150,000.00 | $0.00 | $150,000.00 | 100.00% |
| 100.148.1000000.0000.000 | Salaries | $180,876.00 | $0.00 | $180,876.00 | $65,862.81 | $65,862.81 | $115,013.19 | $74,411.95 | $40,601.24 | 22.45% |
| 100.148.2000000.0000.000 | Employee Benefits | $72,884.00 | $0.00 | $72,884.00 | $27,470.00 | $27,470.00 | $45,414.00 | $32,953.31 | $12,460.69 | 17.10% |
| 100.148.3000000.0000.000 | Purchased Services | $7,000.00 | $0.00 | $7,000.00 | $598.41 | $598.41 | $6,401.59 | $110.20 | $6,291.39 | 89.88% |
| 100.148.4000000.0000.000 | Supplies and Materials | $2,875.00 | $0.00 | $2,875.00 | $1,189.02 | $1,189.02 | $1,685.98 | ($254.35) | $1,940.33 | 67.49% |
| | FUNCTION: Gifted and Talented Artistic - 148 | $263,635.00 | $0.00 | $263,635.00 | $95,120.24 | $95,120.24 | $168,514.76 | $107,221.11 | $61,293.65 | 23.25% |
| 100.149.1000000.0000.000 | Salaries | $634,290.00 | $0.00 | $634,290.00 | $426,653.90 | $426,653.90 | $207,636.10 | $351,271.02 | ($143,634.92) | -22.64% |

# Board Report Expenditures

From Date: 7/1/2022 To Date: 1/31/2023

Fiscal Year: 2022-2023

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

☐ Exclude inactive accounts with zero balance

| Account Number | Description | Budget | Adjustments | GL Budget | Current | YTD | Balance | Encumbrance | Budget Bal | % Rem |
|---|---|---|---|---|---|---|---|---|---|---|
| 100.149.2000000.0000.000 | Employee Benefits | $308,789.00 | $0.00 | $308,789.00 | $151,199.95 | $151,199.95 | $157,589.05 | $137,620.92 | $19,968.13 | 6.47% |
| 100.149.3000000.0000.000 | Purchased Services | $2,000,000.00 | $0.00 | $2,000,000.00 | $0.00 | $0.00 | $2,000,000.00 | $0.00 | $2,000,000.00 | 100.00% |
| 100.149.4000000.0000.000 | Supplies and Materials | $3,500.00 | $0.00 | $3,500.00 | $0.00 | $0.00 | $3,500.00 | $0.00 | $3,500.00 | 100.00% |
| FUNCTION: Other Special Programs - 149 | | $2,946,579.00 | $0.00 | $2,946,579.00 | $577,853.85 | $577,853.85 | $2,368,725.15 | $488,891.94 | $1,879,833.21 | 63.80% |
| 100.161.1000000.0000.000 | Salaries | $754,446.00 | $0.00 | $754,446.00 | $372,553.93 | $372,553.93 | $381,892.07 | $401,183.31 | ($19,291.24) | -2.56% |
| 100.161.2000000.0000.000 | Employee Benefits | $424,222.00 | $0.00 | $424,222.00 | $173,689.91 | $173,689.91 | $250,532.09 | $209,504.57 | $41,027.52 | 9.67% |
| 100.161.3000000.0000.000 | Purchased Services | $4,250.00 | $0.00 | $4,250.00 | $8,066.35 | $8,066.35 | ($3,816.35) | $0.00 | ($3,816.35) | -89.80% |
| 100.161.4000000.0000.000 | Supplies and Materials | $30,639.00 | $0.00 | $30,639.00 | $7,392.79 | $7,392.79 | $23,246.21 | ($115.06) | $23,361.27 | 76.25% |
| FUNCTION: Other Exceptional Programs - 161 | | $1,213,557.00 | $0.00 | $1,213,557.00 | $561,702.98 | $561,702.98 | $651,854.02 | $610,572.82 | $41,281.20 | 3.40% |
| 100.172.1000000.0000.000 | Salaries | $16,230.00 | $0.00 | $16,230.00 | $0.00 | $0.00 | $16,230.00 | $0.00 | $16,230.00 | 100.00% |
| 100.172.2000000.0000.000 | Employee Benefits | $3,046.00 | $0.00 | $3,046.00 | $0.00 | $0.00 | $3,046.00 | $0.00 | $3,046.00 | 100.00% |
| FUNCTION: Elementary Summer School - 172 | | $19,276.00 | $0.00 | $19,276.00 | $0.00 | $0.00 | $19,276.00 | $0.00 | $19,276.00 | 100.00% |
| 100.173.1000000.0000.000 | Salaries | $126,450.00 | $0.00 | $126,450.00 | $43,880.00 | $43,880.00 | $82,570.00 | $0.00 | $82,570.00 | 65.30% |
| 100.173.2000000.0000.000 | Employee Benefits | $32,436.00 | $0.00 | $32,436.00 | $13,997.26 | $13,997.26 | $18,438.74 | $0.00 | $18,438.74 | 56.85% |
| FUNCTION: High School Summer School - 173 | | $158,886.00 | $0.00 | $158,886.00 | $57,877.26 | $57,877.26 | $101,008.74 | $0.00 | $101,008.74 | 63.57% |
| 100.175.1000000.0000.000 | Salaries | $995.00 | $0.00 | $995.00 | $0.00 | $0.00 | $995.00 | $0.00 | $995.00 | 100.00% |
| 100.175.2000000.0000.000 | Employee Benefits | $324.00 | $0.00 | $324.00 | $0.00 | $0.00 | $324.00 | $0.00 | $324.00 | 100.00% |
| JNCTION: Instructional Programs Beyond Regular School Day - 175 | | $1,319.00 | $0.00 | $1,319.00 | $0.00 | $0.00 | $1,319.00 | $0.00 | $1,319.00 | 100.00% |
| 100.181.1000000.0000.000 | Salaries | $116,542.00 | $0.00 | $116,542.00 | $66,553.71 | $66,553.71 | $49,988.29 | $48,154.24 | $1,834.05 | 1.57% |
| 100.181.2000000.0000.000 | Employee Benefits | $54,437.00 | $0.00 | $54,437.00 | $20,578.87 | $20,578.87 | $33,858.13 | $15,363.60 | $18,494.53 | 33.97% |
| 100.181.3000000.0000.000 | Purchased Services | $3,500.00 | ($1,130.00) | $2,370.00 | $0.00 | $0.00 | $2,370.00 | $0.00 | $2,370.00 | 100.00% |
| 100.181.4000000.0000.000 | Supplies and Materials | $750.00 | ($750.00) | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| 100.181.5000000.0000.000 | Capital Outlay | $440.00 | $0.00 | $440.00 | $0.00 | $0.00 | $440.00 | $0.00 | $440.00 | 100.00% |
| FUNCTION: Adult Basic Education Programs - 181 | | $175,669.00 | ($1,880.00) | $173,789.00 | $87,132.58 | $87,132.58 | $86,656.42 | $63,517.84 | $23,138.58 | 13.31% |
| 100.182.1000000.0000.000 | Salaries | $7,500.00 | $0.00 | $7,500.00 | $4,250.00 | $4,250.00 | $3,250.00 | $0.00 | $3,250.00 | 43.33% |
| 100.182.2000000.0000.000 | Employee Benefits | $750.00 | $0.00 | $750.00 | $343.76 | $343.76 | $406.24 | $0.00 | $406.24 | 54.17% |
| 100.182.4000000.0000.000 | Supplies and Materials | $3,974.00 | $0.00 | $3,974.00 | $916.42 | $916.42 | $3,057.58 | $0.00 | $3,057.58 | 76.94% |
| FUNCTION: Adult Secondary Education Programs - 182 | | $12,224.00 | $0.00 | $12,224.00 | $5,510.18 | $5,510.18 | $6,713.82 | $0.00 | $6,713.82 | 54.92% |
| 100.188.1000000.0000.000 | Salaries | $24,357.00 | $0.00 | $24,357.00 | $38,309.28 | $38,309.28 | ($13,952.28) | $28,749.79 | ($42,702.07) | -175.32% |
| 100.188.2000000.0000.000 | Employee Benefits | $24,538.00 | $0.00 | $24,538.00 | $16,920.48 | $16,920.48 | $7,617.52 | $15,012.60 | ($7,395.08) | -30.14% |
| 100.188.4000000.0000.000 | Supplies and Materials | $284.00 | $0.00 | $284.00 | $599.45 | $599.45 | ($315.45) | ($370.45) | $55.00 | 19.37% |
| FUNCTION: Parenting/Family Literacy - 188 | | $49,179.00 | $0.00 | $49,179.00 | $55,829.21 | $55,829.21 | ($6,650.21) | $43,391.94 | ($50,042.15) | -101.76% |

# Board Report Expenditures

From Date: 7/1/2022 To Date: 1/31/2023

Fiscal Year: 2022-2023

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

☐ Exclude inactive accounts with zero balance

| Account Number | Description | Budget | Adjustments | GL Budget | Current | YTD | Balance | Encumbrance | Budget Bal | % Rem |
|---|---|---|---|---|---|---|---|---|---|---|
| 100.190.1000000.0000.000 | Salaries | $719,270.00 | $0.00 | $719,270.00 | $303,717.54 | $303,717.54 | $415,552.46 | $327,001.39 | $88,551.07 | 12.31% |
| 100.190.2000000.0000.000 | Employee Benefits | $249,543.00 | $0.00 | $249,543.00 | $95,944.79 | $95,944.79 | $153,598.21 | $103,294.32 | $50,303.89 | 20.16% |
| 100.190.6000000.0000.000 | Other Objects | $20,800.00 | $0.00 | $20,800.00 | $4,106.64 | $4,106.64 | $16,693.36 | $577.50 | $16,115.86 | 77.48% |
| FUNCTION: | Instructional Pupil Activity - 190 | $989,613.00 | $0.00 | $989,613.00 | $403,768.97 | $403,768.97 | $585,844.03 | $430,873.21 | $154,970.82 | 15.66% |
| 100.211.1000000.0000.000 | Salaries | $1,227,802.00 | $0.00 | $1,227,802.00 | $710,689.04 | $710,689.04 | $517,112.96 | $673,457.75 | ($156,344.79) | -12.73% |
| 100.211.2000000.0000.000 | Employee Benefits | $629,449.00 | $0.00 | $629,449.00 | $330,734.92 | $330,734.92 | $298,714.08 | $347,278.46 | ($48,564.38) | -7.72% |
| 100.211.3000000.0000.000 | Purchased Services | $75,000.00 | $0.00 | $75,000.00 | $2,093.60 | $2,093.60 | $72,906.40 | $0.00 | $72,906.40 | 97.21% |
| 100.211.4000000.0000.000 | Supplies and Materials | $26,110.00 | $0.00 | $26,110.00 | $252.74 | $252.74 | $25,857.26 | $0.00 | $25,857.26 | 99.03% |
| FUNCTION: | Attendance and Social Work Services - 211 | $1,958,361.00 | $0.00 | $1,958,361.00 | $1,043,770.30 | $1,043,770.30 | $914,590.70 | $1,020,736.21 | ($106,145.51) | -5.42% |
| 100.212.1000000.0000.000 | Salaries | $3,833,594.00 | $0.00 | $3,833,594.00 | $1,895,105.76 | $1,895,105.76 | $1,938,488.24 | $1,854,415.46 | $84,072.78 | 2.19% |
| 100.212.2000000.0000.000 | Employee Benefits | $1,666,184.00 | $0.00 | $1,666,184.00 | $822,798.42 | $822,798.42 | $843,385.58 | $865,264.62 | ($21,879.04) | -1.31% |
| 100.212.3000000.0000.000 | Purchased Services | $3,500.00 | $0.00 | $3,500.00 | $1,214.67 | $1,214.67 | $2,285.33 | $0.00 | $2,285.33 | 65.30% |
| 100.212.4000000.0000.000 | Supplies and Materials | $51,390.00 | $375.00 | $51,765.00 | $16,150.10 | $16,150.10 | $35,614.90 | ($963.81) | $36,578.71 | 70.66% |
| FUNCTION: | Guidance Services - 212 | $5,554,668.00 | $375.00 | $5,555,043.00 | $2,735,268.95 | $2,735,268.95 | $2,819,774.05 | $2,718,716.27 | $101,057.78 | 1.82% |
| 100.213.1000000.0000.000 | Salaries | $2,216,979.00 | $0.00 | $2,216,979.00 | $1,072,478.41 | $1,072,478.41 | $1,144,500.59 | $1,148,184.93 | ($3,684.34) | -0.17% |
| 100.213.2000000.0000.000 | Employee Benefits | $989,803.00 | $0.00 | $989,803.00 | $485,970.84 | $485,970.84 | $503,832.16 | $572,455.96 | ($68,623.80) | -6.93% |
| 100.213.3000000.0000.000 | Purchased Services | $155,532.00 | $0.00 | $155,532.00 | $80,184.20 | $80,184.20 | $75,347.80 | $180,000.00 | ($104,652.20) | -67.29% |
| 100.213.4000000.0000.000 | Supplies and Materials | $53,952.00 | ($870.00) | $53,082.00 | $22,192.38 | $22,192.38 | $30,889.62 | ($6,856.41) | $37,746.03 | 71.11% |
| 100.213.6000000.0000.000 | Other Objects | $125.00 | $120.00 | $245.00 | $0.00 | $0.00 | $245.00 | $0.00 | $245.00 | 100.00% |
| FUNCTION: | Health Services - 213 | $3,416,391.00 | ($750.00) | $3,415,641.00 | $1,660,825.83 | $1,660,825.83 | $1,754,815.17 | $1,893,784.48 | ($138,969.31) | -4.07% |
| 100.214.1000000.0000.000 | Salaries | $1,315,832.00 | $0.00 | $1,315,832.00 | $717,227.56 | $717,227.56 | $598,604.44 | $681,052.84 | ($82,448.40) | -6.27% |
| 100.214.2000000.0000.000 | Employee Benefits | $551,780.00 | $0.00 | $551,780.00 | $295,409.61 | $295,409.61 | $256,370.39 | $300,189.64 | ($43,819.25) | -7.94% |
| 100.214.3000000.0000.000 | Purchased Services | $102,374.00 | $0.00 | $102,374.00 | $1,277.00 | $1,277.00 | $101,097.00 | $0.00 | $101,097.00 | 98.75% |
| 100.214.4000000.0000.000 | Supplies and Materials | $5,850.00 | $0.00 | $5,850.00 | $5,660.08 | $5,660.08 | $189.92 | $0.00 | $189.92 | 3.25% |
| FUNCTION: | Psychological Services - 214 | $1,975,836.00 | $0.00 | $1,975,836.00 | $1,019,574.25 | $1,019,574.25 | $956,261.75 | $981,242.48 | ($24,980.73) | -1.26% |
| 100.217.1000000.0000.000 | Salaries | $105,935.00 | $0.00 | $105,935.00 | $63,748.29 | $63,748.29 | $42,186.71 | $37,654.20 | $4,532.51 | 4.28% |
| 100.217.2000000.0000.000 | Employee Benefits | $35,863.00 | $0.00 | $35,863.00 | $25,537.48 | $25,537.48 | $10,325.52 | $18,059.70 | ($7,734.18) | -21.57% |
| FUNCTION: | Career Specialist Services - 217 | $141,798.00 | $0.00 | $141,798.00 | $89,285.77 | $89,285.77 | $52,512.23 | $55,713.90 | ($3,201.67) | -2.26% |
| 100.221.1000000.0000.000 | Salaries | $1,982,148.00 | $0.00 | $1,982,148.00 | $1,264,580.54 | $1,264,580.54 | $717,567.46 | $1,072,985.41 | ($355,417.95) | -17.93% |
| 100.221.2000000.0000.000 | Employee Benefits | $762,239.00 | $0.00 | $762,239.00 | $499,408.91 | $499,408.91 | $262,830.09 | $449,450.21 | ($186,620.12) | -24.48% |
| 100.221.3000000.0000.000 | Purchased Services | $615,100.00 | ($44,330.00) | $570,770.00 | $338,555.53 | $338,555.53 | $232,214.47 | $10,208.51 | $222,005.96 | 38.90% |
| 100.221.4000000.0000.000 | Supplies and Materials | $53,115.00 | $43,979.00 | $97,094.00 | $94,566.74 | $94,566.74 | $2,527.26 | $2,493.44 | $33.82 | 0.03% |

# Board Report Expenditures

Fiscal Year: 2022-2023

From Date: 7/1/2022 To Date: 1/31/2023

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

☐ Exclude inactive accounts with zero balance

| Account Number | Description | Budget | Adjustments | GL Budget | Current | YTD | Balance | Encumbrance | Budget Bal | % Rem |
|---|---|---|---|---|---|---|---|---|---|---|
| 100.221.6000000.0000.000 | Other Objects | $31,930.00 | $0.00 | $31,930.00 | $31,232.00 | $31,232.00 | $698.00 | ($120.00) | $818.00 | 2.56% |
| INCTION: Improvement of Instruction Curriculum Development - 221 | | $3,444,532.00 | ($351.00) | $3,444,181.00 | $2,228,343.72 | $2,228,343.72 | $1,215,837.28 | $1,535,017.57 | ($319,180.29) | -9.27% |
| 100.222.1000000.0000.000 | Salaries | $1,987,961.00 | $0.00 | $1,987,961.00 | $935,633.23 | $935,633.23 | $1,052,327.77 | $1,069,349.95 | ($17,022.18) | -0.86% |
| 100.222.2000000.0000.000 | Employee Benefits | $971,380.00 | $0.00 | $971,380.00 | $422,786.61 | $422,786.61 | $548,593.39 | $523,123.38 | $25,470.01 | 2.62% |
| 100.222.3000000.0000.000 | Purchased Services | $0.00 | $0.00 | $0.00 | $2,252.12 | $2,252.12 | ($2,252.12) | $0.00 | ($2,252.12) | 0.00% |
| 100.222.4000000.0000.000 | Supplies and Materials | $418,351.00 | $0.00 | $418,351.00 | $222,662.19 | $222,662.19 | $195,688.81 | $39,451.25 | $156,237.56 | 37.35% |
| 100.222.6000000.0000.000 | Other Objects | $175.00 | $0.00 | $175.00 | $175.00 | $175.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| FUNCTION: Library and Media Services - 222 | | $3,377,867.00 | $0.00 | $3,377,867.00 | $1,583,509.15 | $1,583,509.15 | $1,794,357.85 | $1,631,924.58 | $162,433.27 | 4.81% |
| 100.223.1000000.0000.000 | Salaries | $1,040,915.00 | $0.00 | $1,040,915.00 | $528,672.47 | $528,672.47 | $512,242.53 | $438,902.12 | $73,340.41 | 7.05% |
| 100.223.2000000.0000.000 | Employee Benefits | $411,172.00 | $0.00 | $411,172.00 | $202,387.33 | $202,387.33 | $208,784.67 | $177,818.82 | $30,965.85 | 7.53% |
| 100.223.3000000.0000.000 | Purchased Services | $6,198.00 | $0.00 | $6,198.00 | $0.00 | $0.00 | $6,198.00 | $0.00 | $6,198.00 | 100.00% |
| 100.223.4000000.0000.000 | Supplies and Materials | $3,646.00 | $1,200.00 | $4,846.00 | $3,752.70 | $3,752.70 | $1,093.30 | $0.00 | $1,093.30 | 22.56% |
| 100.223.6000000.0000.000 | Other Objects | $962.00 | $680.00 | $1,642.00 | $1,080.00 | $1,080.00 | $562.00 | $0.00 | $562.00 | 34.23% |
| FUNCTION: Supervision of Special Programs - 223 | | $1,462,893.00 | $1,880.00 | $1,464,773.00 | $735,892.50 | $735,892.50 | $728,880.50 | $616,720.94 | $112,159.56 | 7.66% |
| 100.224.3000000.0000.000 | Purchased Services | $75,622.00 | ($850.00) | $74,772.00 | $21,626.65 | $21,626.65 | $53,145.35 | ($706.27) | $53,851.62 | 72.02% |
| 100.224.4000000.0000.000 | Supplies and Materials | $10,342.00 | $1,200.00 | $11,542.00 | $7,926.30 | $7,926.30 | $3,615.70 | ($434.17) | $4,049.87 | 35.09% |
| 100.224.6000000.0000.000 | Other Objects | $350.00 | ($350.00) | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | 0.00% |
| FUNCTION: Improvement of Instruction Inservice & Staff Train - 224 | | $86,314.00 | $0.00 | $86,314.00 | $29,552.95 | $29,552.95 | $56,761.05 | ($1,140.44) | $57,901.49 | 67.08% |
| 100.231.1000000.0000.000 | Salaries | $68,922.00 | $0.00 | $68,922.00 | $36,102.00 | $36,102.00 | $32,820.00 | $28,717.50 | $4,102.50 | 5.95% |
| 100.231.2000000.0000.000 | Employee Benefits | $21,336.00 | $0.00 | $21,336.00 | $10,736.66 | $10,736.66 | $10,599.34 | $8,183.20 | $2,416.14 | 11.32% |
| 100.231.3000000.0000.000 | Purchased Services | $387,450.00 | $0.00 | $387,450.00 | $360,882.51 | $360,882.51 | $26,567.49 | $30,217.16 | ($3,649.67) | -0.94% |
| 100.231.6000000.0000.000 | Other Objects | $550,000.00 | $0.00 | $550,000.00 | $609,209.00 | $609,209.00 | ($59,209.00) | $0.00 | ($59,209.00) | -10.77% |
| FUNCTION: Board of Education - 231 | | $1,027,708.00 | $0.00 | $1,027,708.00 | $1,016,930.17 | $1,016,930.17 | $10,777.83 | $67,117.86 | ($56,340.03) | -5.48% |
| 100.232.1000000.0000.000 | Salaries | $295,419.00 | $0.00 | $295,419.00 | $176,777.82 | $176,777.82 | $118,641.18 | $124,841.18 | ($6,200.00) | -2.10% |
| 100.232.2000000.0000.000 | Employee Benefits | $108,081.00 | $0.00 | $108,081.00 | $60,401.32 | $60,401.32 | $47,679.68 | $45,732.14 | $1,947.54 | 1.80% |
| 100.232.3000000.0000.000 | Purchased Services | $23,500.00 | $0.00 | $23,500.00 | $22,690.67 | $22,690.67 | $809.33 | $61,817.61 | ($61,008.28) | -259.61% |
| 100.232.4000000.0000.000 | Supplies and Materials | $9,723.00 | $0.00 | $9,723.00 | $1,604.70 | $1,604.70 | $8,118.30 | ($74.13) | $8,192.43 | 84.26% |
| 100.232.6000000.0000.000 | Other Objects | $7,500.00 | $0.00 | $7,500.00 | $1,427.84 | $1,427.84 | $6,072.16 | $0.00 | $6,072.16 | 80.96% |
| FUNCTION: Office of Superintendent - 232 | | $444,223.00 | $0.00 | $444,223.00 | $262,902.35 | $262,902.35 | $181,320.65 | $232,316.80 | ($50,996.15) | -11.48% |
| 100.233.1000000.0000.000 | Salaries | $11,852,120.00 | $0.00 | $11,852,120.00 | $6,595,313.83 | $6,595,313.83 | $5,256,806.17 | $5,229,115.30 | $27,690.87 | 0.23% |
| 100.233.2000000.0000.000 | Employee Benefits | $5,029,520.00 | $0.00 | $5,029,520.00 | $2,780,269.41 | $2,780,269.41 | $2,249,250.59 | $2,380,085.41 | ($130,834.82) | -2.60% |
| 100.233.3000000.0000.000 | Purchased Services | $217,705.00 | ($14,192.89) | $203,512.11 | $40,667.13 | $40,667.13 | $162,844.98 | $4,292.50 | $158,552.48 | 77.91% |

# Board Report Expenditures

From Date: 7/1/2022 To Date: 1/31/2023

Fiscal Year: 2022-2023

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

☐ Exclude inactive accounts with zero balance

| Account Number | Description | Budget | Adjustments | GL Budget | Current | YTD | Balance | Encumbrance | Budget Bal | % Rem |
|---|---|---|---|---|---|---|---|---|---|---|
| 100.233.4000000.0000.000 | Supplies and Materials | $256,952.00 | $13,568.89 | $270,520.89 | $167,527.58 | $167,527.58 | $102,993.31 | $11,307.83 | $91,685.48 | 33.89% |
| 100.233.6000000.0000.000 | Other Objects | $24,026.00 | $200.00 | $24,226.00 | $21,058.73 | $21,058.73 | $3,167.27 | $591.36 | $2,575.91 | 10.63% |
| FUNCTION: School Administration - 233 | | $17,380,323.00 | ($424.00) | $17,379,899.00 | $9,604,836.68 | $9,604,836.68 | $7,775,062.32 | $7,625,392.40 | $149,669.92 | 0.86% |
| 100.251.1000000.0000.000 | Salaries | $73,206.00 | $0.00 | $73,206.00 | $22,065.97 | $22,065.97 | $51,140.03 | $22,620.61 | $28,519.42 | 38.96% |
| 100.251.2000000.0000.000 | Employee Benefits | $54,505.00 | $0.00 | $54,505.00 | $12,145.95 | $12,145.95 | $42,359.05 | $14,455.60 | $27,903.45 | 51.19% |
| 100.251.3000000.0000.000 | Purchased Services | $326,600.00 | $0.00 | $326,600.00 | $77,944.75 | $77,944.75 | $248,655.25 | $147,417.80 | $101,237.45 | 31.00% |
| 100.251.4000000.0000.000 | Supplies and Materials | $77,500.00 | ($49,000.00) | $28,500.00 | $920.14 | $920.14 | $27,579.86 | $0.00 | $27,579.86 | 96.77% |
| 100.251.5000000.0000.000 | Capital Outlay | $0.00 | $49,000.00 | $49,000.00 | $0.00 | $0.00 | $49,000.00 | $0.00 | $49,000.00 | 100.00% |
| UNCTION: Student Transportation (Federal/District Mandated) - 251 | | $531,811.00 | $0.00 | $531,811.00 | $113,076.81 | $113,076.81 | $418,734.19 | $184,494.01 | $234,240.18 | 44.05% |
| 100.252.1000000.0000.000 | Salaries | $971,162.00 | $0.00 | $971,162.00 | $555,664.31 | $555,664.31 | $415,497.69 | $399,835.34 | $15,662.35 | 1.61% |
| 100.252.2000000.0000.000 | Employee Benefits | $450,617.00 | $0.00 | $450,617.00 | $237,564.93 | $237,564.93 | $213,052.07 | $180,147.61 | $32,904.46 | 7.30% |
| 100.252.3000000.0000.000 | Purchased Services | $194,807.00 | $0.00 | $194,807.00 | $79,170.54 | $79,170.54 | $115,636.46 | $14,098.33 | $101,538.13 | 52.12% |
| 100.252.4000000.0000.000 | Supplies and Materials | $53,655.00 | $0.00 | $53,655.00 | $3,999.45 | $3,999.45 | $49,655.55 | $2,220.75 | $47,434.80 | 88.41% |
| 100.252.5000000.0000.000 | Capital Outlay | $12,964.00 | $0.00 | $12,964.00 | $0.00 | $0.00 | $12,964.00 | $5,265.00 | $7,699.00 | 59.39% |
| 100.252.6000000.0000.000 | Other Objects | $7,500.00 | $0.00 | $7,500.00 | $5,275.00 | $5,275.00 | $2,225.00 | $298.00 | $1,927.00 | 25.69% |
| FUNCTION: Fiscal Services - 252 | | $1,690,705.00 | $0.00 | $1,690,705.00 | $881,674.23 | $881,674.23 | $809,030.77 | $601,865.03 | $207,165.74 | 12.25% |
| 100.253.1000000.0000.000 | Salaries | $184,896.00 | $0.00 | $184,896.00 | $0.00 | $0.00 | $184,896.00 | $0.00 | $184,896.00 | 100.00% |
| 100.253.2000000.0000.000 | Employee Benefits | $86,042.00 | $0.00 | $86,042.00 | $0.00 | $0.00 | $86,042.00 | $0.00 | $86,042.00 | 100.00% |
| 100.253.3000000.0000.000 | Purchased Services | $15,000.00 | $0.00 | $15,000.00 | $0.00 | $0.00 | $15,000.00 | $0.00 | $15,000.00 | 100.00% |
| 100.253.4000000.0000.000 | Supplies and Materials | $15,000.00 | $0.00 | $15,000.00 | $4,335.70 | $4,335.70 | $10,664.30 | $70.02 | $10,594.28 | 70.63% |
| 100.253.5000000.0000.000 | Capital Outlay | $0.00 | $0.00 | $0.00 | $613,076.08 | $613,076.08 | ($613,076.08) | $0.00 | ($613,076.08) | 0.00% |
| FUNCTION: Facilities Acquisition and Construction - 253 | | $300,938.00 | $0.00 | $300,938.00 | $617,411.78 | $617,411.78 | ($316,473.78) | $70.02 | ($316,543.80) | -105.19% |
| 100.254.1000000.0000.000 | Salaries | $7,251,251.00 | $0.00 | $7,251,251.00 | $4,230,821.58 | $4,230,821.58 | $3,020,429.42 | $2,835,094.43 | $185,334.99 | 2.56% |
| 100.254.2000000.0000.000 | Employee Benefits | $3,722,444.00 | $0.00 | $3,722,444.00 | $2,076,689.36 | $2,076,689.36 | $1,645,754.64 | $1,525,054.54 | $120,700.10 | 3.24% |
| 100.254.3000000.0000.000 | Purchased Services | $5,261,973.00 | $0.00 | $5,261,973.00 | $3,033,464.61 | $3,033,464.61 | $2,228,508.39 | $1,435,455.49 | $793,052.90 | 15.07% |
| 100.254.4000000.0000.000 | Supplies and Materials | $6,514,538.00 | $0.00 | $6,514,538.00 | $2,890,010.42 | $2,890,010.42 | $3,624,527.58 | $511,459.84 | $3,113,067.74 | 47.79% |
| 100.254.5000000.0000.000 | Capital Outlay | $83,685.00 | $0.00 | $83,685.00 | $31,592.46 | $31,592.46 | $52,092.54 | $16,984.67 | $35,107.87 | 41.95% |
| 100.254.6000000.0000.000 | Other Objects | $500.00 | $0.00 | $500.00 | $577.50 | $577.50 | ($77.50) | ($42.50) | ($35.00) | -7.00% |
| FUNCTION: Operation and Maintenance of Plant - 254 | | $22,834,391.00 | $0.00 | $22,834,391.00 | $12,263,155.93 | $12,263,155.93 | $10,571,235.07 | $6,324,006.47 | $4,247,228.60 | 18.60% |
| 100.255.1000000.0000.000 | Salaries | $5,397,535.00 | $0.00 | $5,397,535.00 | $2,326,078.54 | $2,326,078.54 | $3,071,456.46 | $2,090,393.73 | $981,062.73 | 18.18% |
| 100.255.2000000.0000.000 | Employee Benefits | $2,390,347.00 | $0.00 | $2,390,347.00 | $1,066,617.47 | $1,066,617.47 | $1,323,729.53 | $1,101,162.01 | $222,567.52 | 9.31% |
| 100.255.3000000.0000.000 | Purchased Services | $180,000.00 | $0.00 | $180,000.00 | $55,426.44 | $55,426.44 | $124,573.56 | $52,791.29 | $71,782.27 | 39.88% |
| 100.255.4000000.0000.000 | Supplies and Materials | $56,500.00 | $0.00 | $56,500.00 | $17,639.98 | $17,639.98 | $38,860.02 | ($1,397.07) | $40,257.09 | 71.25% |

# Board Report Expenditures

From Date: 7/1/2022 To Date: 1/31/2023

Fiscal Year: 2022-2023

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

☐ Exclude inactive accounts with zero balance

| Account Number | Description | Budget | Adjustments | GL Budget | Current | YTD | Balance | Encumbrance | Budget Bal | % Rem |
|---|---|---|---|---|---|---|---|---|---|---|
| 100.255.6000000.0000.000 | Other Objects | $1,000.00 | $0.00 | $1,000.00 | $0.00 | $0.00 | $1,000.00 | $0.00 | $1,000.00 | 100.00% |
| FUNCTION: Student Transportation (State Mandated) - 255 | | $8,025,382.00 | $0.00 | $8,025,382.00 | $3,465,762.43 | $3,465,762.43 | $4,559,619.57 | $3,242,949.96 | $1,316,669.61 | 16.41% |
| 100.256.1000000.0000.000 | Salaries | $0.00 | $0.00 | $0.00 | $144,053.58 | $144,053.58 | ($144,053.58) | $0.00 | ($144,053.58) | 0.00% |
| 100.256.2000000.0000.000 | Employee Benefits | $0.00 | $0.00 | $0.00 | $18,516.27 | $18,516.27 | ($18,516.27) | $0.00 | ($18,516.27) | 0.00% |
| 100.256.4000000.0000.000 | Supplies and Materials | $0.00 | $0.00 | $0.00 | $279,751.45 | $279,751.45 | ($279,751.45) | $1,020,248.55 | ($1,300,000.00) | 0.00% |
| FUNCTION: Food Services - 256 | | $0.00 | $0.00 | $0.00 | $442,321.30 | $442,321.30 | ($442,321.30) | $1,020,248.55 | ($1,462,569.85) | 0.00% |
| 100.257.1000000.0000.000 | Salaries | $331,152.00 | $0.00 | $331,152.00 | $162,450.18 | $162,450.18 | $168,701.82 | $113,178.48 | $55,523.34 | 16.77% |
| 100.257.2000000.0000.000 | Employee Benefits | $108,476.00 | $0.00 | $108,476.00 | $66,552.98 | $66,552.98 | $41,923.02 | $48,811.73 | ($6,888.71) | -6.35% |
| 100.257.3000000.0000.000 | Purchased Services | $508,294.00 | $0.00 | $508,294.00 | $272,637.63 | $272,637.63 | $235,656.37 | $4,146.02 | $231,510.35 | 45.55% |
| 100.257.4000000.0000.000 | Supplies and Materials | $44,911.00 | $0.00 | $44,911.00 | $12,317.95 | $12,317.95 | $32,593.05 | ($637.49) | $33,230.54 | 73.99% |
| FUNCTION: Internal Services - 257 | | $992,833.00 | $0.00 | $992,833.00 | $513,958.74 | $513,958.74 | $478,874.26 | $165,498.74 | $313,375.52 | 31.56% |
| 100.258.1000000.0000.000 | Salaries | $216,253.00 | $0.00 | $216,253.00 | $132,898.82 | $132,898.82 | $83,354.18 | $102,791.55 | ($19,437.37) | -8.99% |
| 100.258.2000000.0000.000 | Employee Benefits | $90,293.00 | $0.00 | $90,293.00 | $52,563.73 | $52,563.73 | $37,729.27 | $39,731.01 | ($2,001.74) | -2.22% |
| 100.258.3000000.0000.000 | Purchased Services | $2,384,234.00 | $0.00 | $2,384,234.00 | $873,685.13 | $873,685.13 | $1,510,548.87 | $1,378,609.66 | $131,939.21 | 5.53% |
| 100.258.4000000.0000.000 | Supplies and Materials | $25,000.00 | $0.00 | $25,000.00 | $14,190.93 | $14,190.93 | $10,809.07 | $1,132.56 | $9,676.51 | 38.71% |
| 100.258.6000000.0000.000 | Other Objects | $410.00 | $0.00 | $410.00 | $0.00 | $0.00 | $410.00 | $0.00 | $410.00 | 100.00% |
| FUNCTION: Security - 258 | | $2,716,190.00 | $0.00 | $2,716,190.00 | $1,073,338.61 | $1,073,338.61 | $1,642,851.39 | $1,522,264.78 | $120,586.61 | 4.44% |
| 100.262.1000000.0000.000 | Salaries | $757,597.00 | $0.00 | $757,597.00 | $458,310.00 | $458,310.00 | $299,287.00 | $321,291.34 | ($22,004.34) | -2.90% |
| 100.262.2000000.0000.000 | Employee Benefits | $370,120.00 | $0.00 | $370,120.00 | $184,331.37 | $184,331.37 | $185,788.63 | $134,600.38 | $51,188.25 | 13.83% |
| 100.262.3000000.0000.000 | Purchased Services | $25,000.00 | $0.00 | $25,000.00 | $30,000.00 | $30,000.00 | ($5,000.00) | $20,342.50 | ($25,342.50) | -101.37% |
| FUNCTION: Planning - 262 | | $1,152,717.00 | $0.00 | $1,152,717.00 | $672,641.37 | $672,641.37 | $480,075.63 | $476,234.22 | $3,841.41 | 0.33% |
| 100.263.1000000.0000.000 | Salaries | $412,349.00 | $0.00 | $412,349.00 | $266,803.00 | $266,803.00 | $145,546.00 | $178,074.85 | ($32,528.85) | -7.89% |
| 100.263.2000000.0000.000 | Employee Benefits | $188,907.00 | $0.00 | $188,907.00 | $114,234.71 | $114,234.71 | $74,672.29 | $78,099.74 | ($3,427.45) | -1.81% |
| 100.263.3000000.0000.000 | Purchased Services | $184,886.00 | $0.00 | $184,886.00 | $80,111.16 | $80,111.16 | $104,774.84 | ($30.00) | $104,804.84 | 56.69% |
| 100.263.4000000.0000.000 | Supplies and Materials | $40,000.00 | $0.00 | $40,000.00 | $36,298.52 | $36,298.52 | $3,701.48 | ($130.63) | $3,832.11 | 9.58% |
| 100.263.6000000.0000.000 | Other Objects | $12,000.00 | $0.00 | $12,000.00 | ($3,092.14) | ($3,092.14) | $15,092.14 | $0.00 | $15,092.14 | 125.77% |
| FUNCTION: Information Services - 263 | | $838,142.00 | $0.00 | $838,142.00 | $494,355.25 | $494,355.25 | $343,786.75 | $256,013.96 | $87,772.79 | 10.47% |
| 100.264.1000000.0000.000 | Salaries | $782,105.00 | $0.00 | $782,105.00 | $480,743.30 | $480,743.30 | $301,361.70 | $315,768.82 | ($14,407.12) | -1.84% |
| 100.264.2000000.0000.000 | Employee Benefits | $301,236.00 | $0.00 | $301,236.00 | $200,945.08 | $200,945.08 | $100,290.92 | $138,237.99 | ($37,947.07) | -12.60% |
| 100.264.3000000.0000.000 | Purchased Services | $34,700.00 | $0.00 | $34,700.00 | $18,094.38 | $18,094.38 | $16,605.62 | $15,419.86 | $1,185.76 | 3.42% |
| 100.264.4000000.0000.000 | Supplies and Materials | $30,402.00 | $0.00 | $30,402.00 | $22,598.41 | $22,598.41 | $7,803.59 | $2.84 | $7,800.75 | 25.66% |
| 100.264.6000000.0000.000 | Other Objects | $1,750.00 | $0.00 | $1,750.00 | $1,150.00 | $1,150.00 | $600.00 | $0.00 | $600.00 | 34.29% |
| FUNCTION: Staff Services - 264 | | $1,150,193.00 | $0.00 | $1,150,193.00 | $723,531.17 | $723,531.17 | $426,661.83 | $469,429.51 | ($42,767.68) | -3.72% |

# Board Report Expenditures

From Date: 7/1/2022 To Date: 1/31/2023

Fiscal Year: 2022-2023

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

☐ Exclude inactive accounts with zero balance

| Account Number | Description | Budget | Adjustments | GL Budget | Current | YTD | Balance | Encumbrance | Budget Bal | % Rem |
|---|---|---|---|---|---|---|---|---|---|---|
| 100.266.1000000.0000.000 | Salaries | $1,723,291.00 | $0.00 | $1,723,291.00 | $1,014,297.80 | $1,014,297.80 | $708,993.20 | $668,017.67 | $40,975.53 | 2.38% |
| 100.266.2000000.0000.000 | Employee Benefits | $714,750.00 | $0.00 | $714,750.00 | $411,145.19 | $411,145.19 | $303,604.81 | $289,242.07 | $14,362.74 | 2.01% |
| 100.266.3000000.0000.000 | Purchased Services | $1,476,867.00 | ($25,000.00) | $1,451,867.00 | $716,634.86 | $716,634.86 | $735,232.14 | $203,073.15 | $532,158.99 | 36.65% |
| 100.266.4000000.0000.000 | Supplies and Materials | $25,000.00 | $25,000.00 | $50,000.00 | $14,661.69 | $14,661.69 | $35,338.31 | $593.13 | $34,745.18 | 69.49% |
| 100.266.6000000.0000.000 | Other Objects | $176.00 | $0.00 | $176.00 | $200.00 | $200.00 | ($24.00) | $0.00 | ($24.00) | -13.64% |
| FUNCTION: Technology and Data Processing Services - 266 | | $3,940,084.00 | $0.00 | $3,940,084.00 | $2,156,939.54 | $2,156,939.54 | $1,783,144.46 | $1,160,926.02 | $622,218.44 | 15.79% |
| 100.271.1000000.0000.000 | Salaries | $2,076,449.00 | $0.00 | $2,076,449.00 | $1,008,254.17 | $1,008,254.17 | $1,068,194.83 | $847,123.78 | $221,071.05 | 10.65% |
| 100.271.2000000.0000.000 | Employee Benefits | $633,048.00 | $0.00 | $633,048.00 | $346,301.08 | $346,301.08 | $286,746.92 | $299,244.08 | ($12,497.16) | -1.97% |
| 100.271.3000000.0000.000 | Purchased Services | $217,528.00 | $351.00 | $217,879.00 | $150,654.75 | $150,654.75 | $67,224.25 | $8,270.42 | $58,953.83 | 27.06% |
| 100.271.4000000.0000.000 | Supplies and Materials | $21,600.00 | $0.00 | $21,600.00 | $117.02 | $117.02 | $21,482.98 | ($111.00) | $21,593.98 | 99.97% |
| 100.271.6000000.0000.000 | Other Objects | $390,000.00 | $0.00 | $390,000.00 | $375,000.00 | $375,000.00 | $15,000.00 | $0.00 | $15,000.00 | 3.85% |
| FUNCTION: Pupil Service Activities - 271 | | $3,338,625.00 | $351.00 | $3,338,976.00 | $1,880,327.02 | $1,880,327.02 | $1,458,648.98 | $1,154,527.28 | $304,121.70 | 9.11% |
| 100.390.3000000.0000.000 | Purchased Services | $15,000.00 | $0.00 | $15,000.00 | $0.00 | $0.00 | $15,000.00 | $0.00 | $15,000.00 | 100.00% |
| 100.390.4000000.0000.000 | Supplies and Materials | $5,850.00 | $0.00 | $5,850.00 | $0.00 | $0.00 | $5,850.00 | $0.00 | $5,850.00 | 100.00% |
| FUNCTION: Other Community Services - 390 | | $20,850.00 | $0.00 | $20,850.00 | $0.00 | $0.00 | $20,850.00 | $0.00 | $20,850.00 | 100.00% |
| 100.412.7000000.0000.000 | Transfers | $20,000.00 | $0.00 | $20,000.00 | $38,107.37 | $38,107.37 | ($18,107.37) | $0.00 | ($18,107.37) | -90.54% |
| FUNCTION: Payments to Other Governmental Units - 412 | | $20,000.00 | $0.00 | $20,000.00 | $38,107.37 | $38,107.37 | ($18,107.37) | $0.00 | ($18,107.37) | -90.54% |
| 100.425.7000000.0000.000 | Transfers | $267,897.00 | $0.00 | $267,897.00 | $0.00 | $0.00 | $267,897.00 | $0.00 | $267,897.00 | 100.00% |
| FUNCTION: Transfer to Food Service Fund - 425 | | $267,897.00 | $0.00 | $267,897.00 | $0.00 | $0.00 | $267,897.00 | $0.00 | $267,897.00 | 100.00% |
| Grand Total: | | $212,481,590.00 | $0.00 | $212,481,590.00 | $107,191,572.93 | $107,191,572.93 | $105,290,017.07 | $100,299,240.91 | $4,990,776.16 | 2.35% |

End of Report

EXHIBIT F

Memorandum

To: Members of the Board of Trustees

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

Date: March 23, 2023

Re: March 27, 2023 Board Meeting
**Action item**
Proposed Revisions to Board Policy IE "Organization of Instruction"

---

**Item:** Proposed Revisions to Board Policy IE "Organization of Instruction"

**Background:** This proposal is presented as a follow-up to the February 13, 2023 Board Five-Year Master Facilities Workshop that outlined seven key questions. The second question that was discussed was "How will School District Five be organized?" Currently, there are almost ten (10) grade structures within our schools and programs in School District Five: Pre-K-5 Elementary, K-4 Elementary, K-5 Elementary, 5-6 Intermediate, 6 Intermediate, 7-8 Middle, 6-8 Middle, 9-12 High, and District-Wide Programs.

The administration has proposed a five (5) level grade structure for the future of School District Five of Lexington and Richland Counties to include Pre-K-5 Elementary, K-5 Elementary, 6-8 Middle, 9-12 High School, and District Wide Schools (Academy for Success, Adult Education, Center for Advanced Technical Studies, and Flexible Innovative Virtual Education - F.I.V.E.)

The revisions to Board Policy IE "Organization of Instruction" represent the discussion held at the Board Five-Year Master Facilities Workshop.

The finalized grade structure will determine the need for any rezoning/redistricting of the schools.

**Recommendation:** The administration recommends that the Board of Trustees approve the Second and Final Reading of the proposed revisions to Board Policy IE "Organization of Instruction."

I will be present at the Board Meeting to answer any questions you may have regarding this information.

AERsr:aw

Attachments - Current Policy & Revisions to Board Policy IE

CURRENT POLICY

# Policy IE Organization of Instruction

*Issued* **1/21**

Purpose: To establish the basic structure for instruction in the district.

The board of the School District Five of Lexington and Richland Counties is legally responsible for meeting the needs of persons of all ages for elementary and secondary education.

In establishing an educational structure to provide the required programs, the board chooses an elementary (pre-K/K through five), intermediate (six or five and six), middle (six through eight or seven and eight), and high school (nine through 12) form of organization.

The district will maintain a district career and technical education center that will serve students in high school interested in career and technical education courses beginning with the 2012-2013 school year.

The district also maintains an alternative school that serves students in grades six through 12.

The district may offer a choice-based virtual program for students in grades K through 12 beginning with the 2021-2022 school year.

The district provides preschool, child development, and adult/community programs structured to meet the needs of the citizens of the district.

Adopted 8/1/73; Revised 11/16/81, 9/12/11, 5/18/15, 1/25/21

School District Five of Lexington and Richland Counties

# ORGANIZATION OF INSTRUCTION

*Code* **IE** *Issued* ~~1/21~~ **3/23**

Purpose: To establish the basic structure for instruction in the district.

The board of the School District Five of Lexington and Richland Counties is legally responsible for meeting the needs of persons of all ages for elementary and secondary education.

In establishing an educational structure to provide the required programs, the board ~~chooses~~ prefers an elementary (pre-K/K through five), ~~intermediate (six or five and six)~~, middle (six through eight ~~or seven and eight~~), and high school (nine through 12) form of organization.

The district will maintain a district career and technical education center that will serve students in high school interested in career and technical education courses. ~~beginning with the 2012-2013 school year.~~

The district also maintains an alternative school that serves students in grades six through 12.

The district may ~~will~~ offer a choice-based virtual program for students in grades K ~~six~~ through 12. ~~beginning with the 2021-2022 2023-2024 school year.~~

The district provides preschool, child development, and adult/community programs structured to meet the needs of the citizens of the district.

Adopted 8/1/73; Revised 11/16/81, 9/12/11, 5/18/15, 1/25/21

EXHIBIT G

Memorandum

To: Members of the Board of Trustees

From: Dr. Tamara Turner
Chief Human Resources Officer

Date: March 23, 2023

Re: March 27, 2023 Board Meeting
**Action Item**
Second and Final Reading of Proposed New Board Policy GCLE "Unencumbered Time"

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**Item:** Proposed New Board Policy GCLE "Unencumbered Time"

**Background:** As stated in the Policy and Legal Services Advisory published by the South Carolina School Boards Association (SCSBA) on February 6, 2023:

> Pursuant to the new statute, S.C. Code Section 59-5-63, local school boards must adopt an unencumbered time policy at a regularly scheduled meeting within three months of the adoption of a policy by the State Board of Education (SBE). The SBE adopted a model policy for unencumbered time on January 17, 2023. The local board policy must include, at a minimum, the SBE statewide policy but may also include additional provisions. The local board policy must be updated to reflect any changes made by the SBE to the statewide policy; and the policy must be adopted within three months of the SBE changes. The local board's unencumbered time policy and any subsequent revisions must be submitted to the South Carolina Department of Education within 30 days of adoption. Further, the provisions of this statute must be completely implemented by districts before July 1, 2023.

**Recommendation:** Administration recommends that the Board of Trustees approve the Second and Final Reading of the proposed new Board Policy GCLE "Unencumbered Time" to adopt the statewide policy for unencumbered time adopted by the State Board of Education (SBE), submit the newly adopted policy to the South Carolina Department of Education within 30 days of adoption, and completely implement the provisions of the Act before the July 1, 2023, deadline.

A copy of the SBE's unencumbered time model policy is attached for your review. I will be present to answer any questions you may have regarding the recommendation.

Attachments - SBE's Unencumbered Time Model Policy GCLE "Unencumbered Time"

**SECOND AND FINAL READING: PROPOSED BOARD POLICY – MARCH 27, 2023**

*Policy*

**UNENCUMBERED TIME**

*Code* **GCLE** *Issued* _____

In accordance with S.C. Code Section 59-5-63, the District will require the principal of each elementary school to provide at least 30 minutes of unencumbered time on each regular school day to all full-time teachers teaching in grades kindergarten through fifth grade; and require the principal of each elementary, middle or high school, to provide at least 30 minutes of unencumbered time on each regular school day to any full-time teacher who is responsible for instructing a special education class for more than 20 percent of the school day with students who are removed from the general education setting.

**Procedure on how to implement unencumbered time.**

Unencumbered time is defined as 30 minutes during the regular school day where teachers are afforded time that is self-directed without assigned duties or responsibilities, including direct instruction or supervision of students.

The placement of unencumbered time within the regular school day is flexible based on the staffing and scheduling needs of each school.

The unencumbered 30 minutes must not include parent/teacher conferences, bus duty, IEP and 504 meetings, team meetings, or professional development activities that are not self-directed. Also, the unencumbered time must not include managing or supervising the transition of students to and from activities, classes, lunch, recess, or any other activities.

The provision of 30 minutes of unencumbered time must not be achieved by expanding the expected work hours for teachers before or after the school day.

Leadership may only withhold or reduce a teacher's unencumbered time in a given school day as a result of extreme or unavoidable circumstances. Such circumstances could include, but are not limited to, an emergency drill or an insufficient number of staff and substitute teachers to maintain instruction in the school. Additional compensation may not be offered in place of unencumbered time, except as provided by Section 59-5-63(A)(2)(c).

The intentional failure of the school's principal to provide eligible teachers with 30 minutes of unencumbered time may result in appropriate action under the District's disciplinary policy and may be sufficient cause for the suspension or revocation of such person's educator certificate pursuant to Section 59-25-160.

The intentional failure of the local school board to provide eligible teachers with the required 30 minutes of unencumbered time may subject the Board to any penalties prescribed by law.

Adopted __/__/23

_____ **SCHOOL DISTRICT**

Legal references:

A. S.C. Code, 1976, as amended:
   1. Section 59-5-63 – Unencumbered time requirement; policies; school district adoptions.
   2. Section 59-25-160 – Revocation or suspension of certificate; "just cause" defined.

EXHIBIT H

MEMORANDUM

To: Members of the Board of Trustees

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

From: David A. Weissman
Executive Director of Operations

Date: March 21, 2023

Re: **Action Agenda:** March 27, 2023 Board Meeting
Approval of Proposed Revisions to 2016-2021 Capital Funds

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**Background**: In October 2021 the administration requested that remaining 2016-2021 capital funds be reallocated for school improvements including facility needs and furniture. At the October 30, 2022 Board meeting, revisions were made to those funds to include Americans with Disabilities Act upgrades and vestibule upgrades from projects that were no longer needed due to changes in the needs of the district.

**Issue:** The district has identified additional projects that came in under budget or projects that no longer need funding due to changes in the needs of the District.

| School | Projects | Original Amount | Amount Remaining | Reason |
|---|---|---|---|---|
| BES | Office Space Reconfiguration | $75,000 | $70,000 | Hold project for vestibule remodel; reallocate remaining |
| CATE | Fencing | $5,000 | $5,000 | Not needed at this time; reallocate funds |
| CHS | Practice Field Lighting and Scoreboard | $375,000 | $187,000 | Lighting completed; reallocate remaining |
| CHS | Security Gate Eagle Walkway | $15,000 | $15,000 | Include in stadium project; reallocate funds |
| CIS | Front Canopy | $250,000 | $250,000 | Tie into future projects; reallocate funds |
| CMS | Storage Building & Fencing | $20,000 | $15,300 | Shed completed, fencing included in District project; reallocate remaining |
| DFES | 5k Playground | $140,000 | $6,000 | Completed; reallocate remaining |
| DFES | Smart Boards | $10,000 | $1,700 | Complete; reallocate remaining |
| DFES | Bookshelves | $20,000 | $3,300 | Completed; reallocate remaining |
| DFMS | Media Center Furniture and Projector | $125,000 | $3,100 | Completed; reallocate remaining |
| IES | Smartboards | $15,000 | $2,700 | Completed; reallocate remaining |
| IHS | Music Studio- West Wing | $50,000 | $50,000 | N/A due to IHS project; reallocate funds |

| | | | | |
|---|---|---|---|---|
| NRES | Restroom Floor Replacement | $95,000 | $95,000 | Reassess and reallocate |
| NRES | Flooring | $20,000 | $20,000 | Completed using other funding; reallocate funds |
| NRES | Dishroom Renovation | $5,000 | $5,000 | Tie into future project - Reallocate remaining |
| NRES | Classroom Furniture | $25,000 | $2,500 | Completed using other funding; reallocate funds |
| NRES | Speakers/ Smart Boards | $10,000 | $10,000 | Completed by IT; Reallocate remaining |
| OPES | Furniture | $40,000 | $6,652 | Completed; reallocate remaining |
| OPES | Flooring Replacement | $20,000 | $16,500 | Completed; reallocate remaining |
| RSES | Projector in Media Center | $25,000 | $5,200 | Completed; reallocate remaining |
| | | Total: | $769,952 | |

**Recommendation:** The administration recommends to reallocate the $769,952 funding formerly allocated for the projects above projects for following projects:

- Installation of exterior door alarms at all locations
- Vestibule upgrades at all locations as remaining funds are available
- District Office: Purchase of state fleet vehicle for safety office

DAW: cr

EXHIBIT I

**MEMORANDUM**

To: Members of the Board of Trustees

From: Maddison Paul,
Chief Financial Officer

Date: March 23, 2023

Re: March 27, 2023 Board Meeting
Discussion Agenda
Bond Resolution for Spring Bond Issuance

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Please see the attached presentation outlining the details of the 2023 Series A Bond Issuance and two versions of bond resolutions. The first resolution authorizes the issuance and sale of a not exceeding $25,000,000 general obligation bond through the 2023 SCAGO GO Program and the second resolution authorizes the issuance and sale of not exceeding $25,000,000 general obligation bonds.

Attachments
Spring Bond Issuance Presentation
Bond Resolution – SCAGO
Bond Resolution – Standalone Issuance

# Discussion of Spring Bond Issuance



# Proposed Timeline

- *March 13, 2023 - Board Finance Workshop*
- March 27, 2023 - Discussion of Proposed Bond Resolution
  - Capital projects discussion
  - Cost Comparison
    - SCAGO
    - Bank Placement or Standalone Public Bond
- April 24, 2023 - Final Reading of Proposed Bond Resolution
- May 2023 - Issue Bonds for Capital Improvement Projects

District Five
OF LEXINGTON & RICHLAND COUNTIES

# 2023 Series A Bond Issuance

- *69.5 mills - current approved millage rate*
- 8% Constitutional Debt Limit = $47,860,245
- Annual Maintenance Bond (including technology) = $15M
- 2023 available resources (Irmo HS East Wing) = $10M
  - 2nd tranche of 3 issuances for this project
  - $34M issued in FY22
- Total 1 year bond issuance =$25M

District Five
OF LEXINGTON & RICHLAND COUNTIES

# 2023 Annual Maintenance Projects

| Location /Project | FY 2023-24 |
|---|---|
| | |
| **HE Corley Elementary School** | |
| Building Envelope Improvements | $ 2,500,000 |
| **Lake Murray Elementary School** | |
| Flooring Replacement | $ 300,000 |
| **River Springs Elementary School** | |
| Building Envelope Improvements | $ 2,300,000 |
| **Irmo High School** | |
| Practice Field Lighting | $ 300,000 |
| **Irmo Middle School** | |
| Pave Car Rider Loop | $ 150,000 |
| **Dutch Fork High School** | |
| Practice Field Lighting | $ 300,000 |
| **District Wide** | |
| Activity Bus, Maintenance, Vehicle Replacement &GPS | $ 250,000 |
| Security Improvements District wide | $ 1,000,000 |
| HVAC & Building Automation | $ 1,000,000 |
| A&E for 5 yr. Master Planning Cost | $ 350,000 |
| School Identified Needs | $ 1,400,000 |
| Contingency | $ 1,350,000 |
| Technology | $ 3,800,000 |
| **Grand Total Budget Expense** | **$ 15,000,000** |

District Five
OF LEXINGTON & RICHLAND COUNTIES

# Standalone District Issuance vs. SCAGO

| | Standalone District Issuance 2023 Bonds (Estimate) Par Amout: $24 MM Amount | SCAGO Issuance 2023 Bonds (Estimate) Par Amout: $24 MM Amount | |
|---|---|---|---|
| Bond/Disclosure Counsel Fee | 48,650 | 20,000 | |
| Legal Ad Publication | 500 | - | |
| Financial Advisor Fee | 25,000 | 35,000 | (1) |
| Financial Advisor Expenses | 1,000 | - | |
| Program Administrator/Sponsorship | - | 8,025 | |
| Rating Fee | 15,000 | 5,700 | |
| Trustee/Paying Agent/Registrar | 800 | 500 | |
| Miscellaneous | 5,000 | 500 | |
| | 95,950 | 69,725 | |

Note: All fee quotes are preliminary, based on estimates as determined by PFM (District's Financial Advisor)

(1) Financial Advisory Fees for SCAGO transaction includes fee for SCAGO FA ($20,000) and District FA ($15,000)

District Five OF LEXINGTON & RICHLAND COUNTIES

# Discussion of Spring Bond Resolution

Frannie Heizer,
Burr Forman LLP



# SCAGO Bond Resolution



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

A RESOLUTION

AUTHORIZING THE ISSUANCE AND SALE OF A NOT EXCEEDING $25,000,000 GENERAL OBLIGATION BOND, SERIES 2023, OR SUCH OTHER APPROPRIATE SERIES DESIGNATION, 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 SUPERINTENDENT OF THE SCHOOL DISTRICT TO DETERMINE CERTAIN MATTERS RELATING TO THE BOND; PROVIDING FOR THE PAYMENT OF THE BOND AND THE DISPOSITION OF THE PROCEEDS THEREOF; AND OTHER MATTERS RELATING THERETO.

Adopted: _____, 2023

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.

"Bond" shall mean the general obligation bond authorized and issued pursuant to this Resolution.

"Bond Act" shall mean Title 59, Chapter 71, Article 1, and Section 11-27-50 of the S.C. Code.

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

"Books of Registry" shall mean the registration books maintained by the Registrar in accordance with Section 7 hereof.

"District Superintendent" shall mean the Superintendent of the School District.

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

"Paying Agent" shall mean the School District or such other entity named in the Bond.

"Registrar" shall mean the School District or such other entity named in the Bond.

"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 (hereinafter defined) of the participating school districts issued by SCAGO pursuant to the SCAGO Trust Agreement.

"SCAGO Trust Agreement" shall mean the Master Trust Indenture by and between SCAGO and Regions Bank, 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.

SECTION 2. Findings and Determinations. The Board 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 that the county Board of Trustees wherein the school district is located, if there is such, approve the issuance of such general obligation 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 ("CMA") 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, as of June 30, 2022, is $598,253,067. Eight (8%) percent of such sum is $47,860,245. As of the date hereof, the School District has $22,800,000 of outstanding general obligation debt subject to the limitation imposed Article X, Section 15(6) of the Constitution. Thus, the School District may incur $25,060,245 of additional general obligation debt within its applicable constitutional debt limitation.

(g) Pursuant to a Resolution adopted by the Board on August 13, 2012, the School District has adopted Written Procedures Related to Tax-Exempt Debt.

(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 in the principal amount not exceeding $25,000,000 for the purposes of providing funds to be applied for any of the following purposes: (i) funding capital

improvements (the "Projects"); (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 $25,000,000 general obligation bond of the School District to obtain funds for 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 a single 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 a denomination equal to its par amount not exceeding $25,000,000; shall bear interest (calculated on the basis of a 360-day year comprising twelve 30-day months) from its date payable on the maturity date thereof, at such rate as may be determined by the District Superintendent at the time of the sale thereof; and shall mature on such date 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. The School District shall serve as Registrar and Paying Agent for the Bond.

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

SECTION 5. Delegation of Authority. The District Superintendent is hereby authorized and empowered to: (a) determine the par amount of the Bond; (b) determine the original issue date of the Bond; (c) determine the maturity date and principal amount maturing on such date; (d) determine the interest payment date and principal payment date if different from that set forth herein; (e) designate a Paying Agent and Registrar for the Bond if different from that set forth herein; (f) determine the date and time of sale of the Bond; (g) 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 (h) execute all other agreements, certificates and documents as may be necessary or required in connection with the issuance of the Bond.

SECTION 6. Authorization to Sell General Obligation Bond outside the SCAGO GO Program. The Board hereby delegates to the District Superintendent the authority to cause the Bond authorized herein to be sold and issued outside the SCAGO GO Program. The District Superintendent, upon advice from Bond Counsel, is hereby authorized to approve the forms of such documents as shall be necessary to issue the Bond as a separate stand-alone bond. The Chair of the Board, Vice Chair of the Board, District Superintendent or other authorized officials of the School District are hereby authorized to execute and delivery the documents as approved by the District Superintendent.

SECTION 7. Registration, Transfer and Exchange of Bond. The School District shall cause the Books of Registry to be kept at the offices of the School District, as Registrar for the registration and transfer of the Bond. Upon presentation at its office for such purpose, the Registrar 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 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 School District, as Registrar, 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 duly executed by the registered owner or his duly authorized attorney. Upon the transfer of any such Bond, the School District, as Registrar 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.

The School District, as the Registrar and the Paying Agent may deem or treat the person in whose name the 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 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 the School District, as the Registrar and the Paying Agent shall not be affected by any notice to the contrary. In all cases in which the privilege of transferring the Bond is exercised, the School District shall execute and the School District, as Registrar shall authenticate and deliver the Bond in accordance with the provisions of this Resolution. The School District as the Registrar and the Paying Agent shall not be obliged to make any such transfer of the Bond during the fifteen (15) days preceding the maturity date on the Bond.

SECTION 8. 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 District Superintendent.

SECTION 9. 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 School District, as Registrar 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 respective 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 the trustee of the SCAGO Certificates upon payment of the purchase price thereof, all as contemplated by the SCAGO GO Program.

SECTION 10. 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 the advice of CMA, 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 11. Deposit and Use of Proceeds. (a) Upon the purchase and delivery of the GO Debt, the proceeds derived from the sale of the GO Debt shall be deposited with the Treasurer of Lexington County (the "Lexington 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 Lexington 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 the School District to be known as "School District No. 5 of Lexington County and Richland County, South Carolina, General Obligation Bond, Series 2023 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.

(b) The costs of issuance of the Bond shall, at the direction of the Lexington 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 Board.

(c) 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 Lexington County Treasurer, as designated on the appropriate form solely for the purpose for which the GO Debt was issued.

SECTION 12. 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 Richland County and Lexington County (the "County Auditors") and collected by the Treasurers of Richland County and Lexington County (the "County Treasurers") 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 on 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, a tax, without limit, on all taxable property in the School District sufficient to pay the principal and interest on the Bond as they respectively mature and to create such sinking fund as may be necessary therefor.

SECTION 13. 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 its maturity date. 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 14. 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 rebates of certain amounts to the United States; and

(c) make such reports of information at the time and places required by the IRC.

SECTION 15. Exemption from State Taxes. Both the principal of and interest on the Bond shall in accordance with the provisions of Section 12-2-50 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 16. 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 13 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 17. Remedies. The School District agrees that each of the following may be included as a 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 the State's 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 18. 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 19. 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 20. 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 SCAGO Trust Agreement), in the manner stipulated therein and in this Resolution, then the pledge of the full faith, credit, resources 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. Continuing Disclosure. If applicable, the School District hereby covenants and agrees that it will comply with and carry out all of the provisions of a Continuing Disclosure Certificate. Notwithstanding any other provisions of this Resolution, failure of the School District to comply with the Continuing Disclosure Certificate shall not be considered an event of default, and no liability for damages shall attach therefor. The sole remedy for such failure to comply shall be that any bondholder may take such actions as may be necessary and appropriate, including seeking mandate or specific performance by court order, to cause the School District to comply with their obligations under this Section.

SECTION 22. 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 23. 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 prior to the issuance of the Bond. The Expenditures which are reimbursed are limited to Expenditures which are: (1) 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 the 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 24. 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 Board hereby retains Burr & Forman LLP, as Bond Counsel and Compass Municipal Advisors, LLC, as Financial Advisor with regard to the issuance of the Bond. The District Superintendent is further authorized to execute such contracts, documents or engagement letters as may be necessary and appropriate to effectuate these engagements.

SECTION 25. 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 are, 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 _____, 2023.

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 2023

No. R-1

| INTEREST RATE | MATURITY DATE | BOND PAYMENT DATE | ORIGINAL ISSUE DATE |
|---|---|---|---|

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 on the bond payment date shown above to the registered holder named above, or registered assigns, the principal amount 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 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"). 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 principal and interest on this fully registered Bond shall be paid by check, draft or transfer of funds.

The principal and interest on this Bond shall be paid to Regions Bank (the "Trustee") under the Master Trust Indenture between the South Carolina Association of Governmental Organizations and the Trustee dated May 1, 2022 (the "SCAGO Trust Agreement"), on or before the bond payment date shown above.

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 on 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 Article X, Section 15 of the Constitution of the State of South Carolina, 1895, as amended (the "Constitution"); 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, 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 (the "State"), 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 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; 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 on 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/facsimile signature of the Chair of the Board of Trustees of the School District, attested by the manual/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: _____
Secretary, Board of Trustees

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 _____, _____, 2023.

[PRINCIPAL AMOUNTS AND NAMES OF PARTICIPATING SCHOOL DISTRICTS]

The Bonds will be collectively sold as the South Carolina Association of Governmental Organizations (SCAGO) Certificates of Participation, Series 2023A (Evidencing Undivided Proportionate Interests in General Obligation Debt of Certain South Carolina School Districts) (the "Certificates").

| | |
|---|---|
| Sale Date: | _____, 2023 |
| Sale Time: | _____ a.m., South Carolina time |
| Certificates and Bonds Dated: | _____, 2023 |
| Interest Payment: | March ___, 2024 |
| Maturity: | March ___, 2024 |
| Redemption provisions: | The Certificates and Bonds are not subject to redemption. |
| Book-Entry-Only: | The Certificates will be book-entry-only. |
| Legal Opinion: | Burr & Forman LLP, 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 Certificates will be issued in book-entry only form in denominations of $100,000 and integral multiples of $1,000 in excess of $100,000. 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 officialstatements.compassmuni.com.

For additional information, please contact the School Districts' Bond Counsel, Francenia B. Heizer, Esquire, Burr & Forman LLP, telephone (803) 799-9800; e-mail: fheizer@burr.com or the School Districts' Financial Advisor, Brian Nurick, Senior Managing Director, Compass Municipal Advisors, LLC, telephone (859) 368-9619, e-mail: brian.nurick@compassmuni.com.

*Preliminary, subject to change.

# Standalone Bond Resolution



A RESOLUTION

AUTHORIZING THE ISSUANCE AND SALE OF NOT EXCEEDING $25,000,000 GENERAL OBLIGATION BONDS, SERIES 2023, OR SUCH OTHER APPROPRIATE SERIES DESIGNATION, OF SCHOOL DISTRICT NO. 5 OF LEXINGTON COUNTY AND RICHLAND COUNTY, SOUTH CAROLINA; FIXING THE FORM AND DETAILS OF THE BONDS; AUTHORIZING THE SUPERINTENDENT 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.

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. Findings and Determinations. The Board of Trustees (the "Board"), as the governing body of School District No. 5 of Lexington County and Richland County, South Carolina (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 of the assessed value of all taxable property of such school district upon such terms and conditions as the General Assembly may prescribe. Such Article further provides that if general obligation debt is authorized by a majority vote of the qualified electors of the school district voting in a referendum authorized by law, there shall be no conditions or restrictions limiting the incurring of such indebtedness except as specified in such Article.

(c) Title 59, Chapter 71, Article 1, Code of Laws of South Carolina 1976, as amended (the "School 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 to any amount not exceeding the constitutional debt limitation applicable to such school district. The School 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) Title 11, Chapter 27, Code of Laws of South Carolina 1976, as amended ("Title 11, Chapter 27"), provides that if an election be prescribed by the provisions of the School 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 School Bond Act shall constitute a full and complete authorization to issue bonds in accordance with such remaining provisions. Title 11, Chapter 27 further provides that any school district of the state may issue bonds in fully-registered form.

(e) The assessed value of all taxable property in the School District, as of June 30, 2022, is $598,253,067. Eight (8%) percent of such sum is $47,860,245. As of the date hereof, the School District has $22,800,000 of outstanding general obligation debt subject to the limitation imposed Article X, Section 15(6) of the Constitution. Thus, the School District may incur $25,060,245 of additional general obligation debt within its applicable constitutional debt limitation.

(f) Pursuant to a Resolution adopted by the Board on August 13, 2012, the School District adopted Written Procedures related to Tax-Exempt Debt.

(g) It is now in the best interest of the School District for the Board to provide for the issuance and sale of general obligation bonds of the School District pursuant to the Constitution and laws of the State of South Carolina (the "State") in the principal amount of not exceeding $25,000,000, the proceeds of which will be used for the purposes of funding capital improvements (the "Projects"), paying the costs of issuance of the Bonds (hereinafter defined) and such other lawful purposes as the Board may determine.

Section 2. Authorizations and Details of Bonds. Pursuant to the aforesaid provisions of the Constitution and laws of the State there is hereby authorized to be issued general obligation bonds of the School District in the amount of not exceeding $25,000,000 to obtain funds for any one or more of the purposes mentioned in Section 1(g) above, including any financial and legal fees relating thereto and other incidental costs of issuing the Bonds. The Bonds shall be designated "$25,000,000 (or such lesser amount issued) General Obligation Bonds, Series 2023 (or such other appropriate series designation) of School District No. 5 of Lexington County and Richland County, South Carolina" (the "Bonds").

The Bonds shall be issued as fully-registered bonds; shall be dated as of their date of delivery; shall be in denominations of $5,000 or any integral multiple thereof not exceeding the principal amount of the Bonds maturing in each year; shall be numbered from R-1 upward; shall bear interest at such times as hereafter designated by the Superintendent at such rate or rates as may be determined at the time of the sale thereof; and shall mature serially in successive annual installments as determined by the Superintendent.

Both the principal of and interest on the Bonds 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. The Registrar/Paying Agent shall be a bank, trust company, depository or transfer agent located either within or without the State of South Carolina named by the School District.

Section 3. Delegation of Authority to Determine Certain Matters Relating to the Bonds. The Board hereby delegates to the Superintendent the authority to determine (a) the par amount of the Bonds; (b) the maturity dates of the Bonds and the respective principal amounts maturing on such dates; (c) the interest payment dates of the Bonds; (d) redemption provisions, if any, for the Bonds; and (e) the date, time and manner of sale of the Bonds. At the time of the sale, the School District reserves the right, in its sole discretion, either to decrease or increase the principal amount of the Bonds maturing in any year (all calculations to be rounded to the nearest $5,000), provided that any such decrease or increase shall not exceed 15% of the par amount of the Bonds maturing in any year or such other percentage as agreed to by the School District and the winning bidder.

The Board hereby delegates to the Superintendent the authority to receive bids on behalf of the Board and the authority to award the sale of the Bonds to the lowest bidder therefor in accordance with the terms of the Official Notice of Sale for the Bonds, provided the true interest cost of the Bonds does not exceed 5%. After the sale of the Bonds, the Superintendent shall submit a written report to the Board setting forth the results of the sale of the Bonds.

In addition to the authority delegated above, the Superintendent has the authority, upon recommendation from the School District's Financial Advisor and Bond Counsel, to sell the Bonds through a bank placement if it is determined to be in the best interest of the School District.

Section 4. Registration, Transfer and Exchange of Bonds. The School District shall cause books (herein referred to as the "registry books") to be kept at the offices of the Registrar/Paying Agent, for the registration and transfer of the Bonds. Upon presentation at its office for such purpose the Registrar/Paying Agent shall register or transfer, or cause to be registered or transferred, on such registry books, the Bonds under such reasonable regulations as the Registrar/Paying Agent may prescribe.

Each Bond shall be transferable only upon the registry books of the School District, which shall be kept for such purpose at the principal office of the Registrar/Paying Agent, 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/Paying Agent duly executed by the registered owner or his or her duly authorized attorney. Upon the transfer of any such Bond, the Registrar/Paying Agent on behalf of the School District shall issue in the name of the transferee a new fully-registered Bond of the same 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/Paying Agent.

The School District and the Registrar/Paying Agent may deem or treat the person in whose name any fully-registered Bond shall be registered upon the registry books 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 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/Paying Agent shall be affected by any notice to the contrary. In all cases in which the privilege of transferring Bonds is exercised, the School District shall execute and the Registrar/Paying Agent shall authenticate and deliver Bonds in accordance with the provisions of this Resolution. Neither the School District nor the Registrar/Paying Agent shall be obliged to make any such transfer of Bonds during the fifteen (15) days preceding an interest payment date on such Bonds.

Section 5. Record Date. The School District hereby establishes a record date for the payment of interest or for the giving of notice of any proposed redemption of Bonds, and such record date shall be the fifteenth (15th) day (whether or not a business day) preceding an interest payment date on such Bond or, in the case of any proposed redemption of Bonds, such record date shall be the fifteenth (15th) day (whether or not a business day) prior to the mailing of notice of redemption of Bonds.

Section 6. Mutilation, Loss, Theft or Destruction of Bonds. In case any Bond shall at any time become mutilated in whole or in part, or be lost, stolen or destroyed, or be so defaced as to impair the value thereof to the owner, the School District shall execute and the Registrar shall authenticate and deliver at the principal office of the Registrar, or send by registered mail to the owner thereof at his request, risk and expense a new Bond of the same series, interest rate and maturity and of like tenor and effect in exchange or substitution for and upon the surrender for cancellation of such defaced, mutilated or partly destroyed Bond, or in lieu of or in substitution for such lost, stolen or destroyed Bond. In any such event the applicant for the issuance of a substitute Bond shall furnish the School District and the Registrar evidence or proof satisfactory to the School District and the Registrar of the loss, destruction, mutilation, defacement or theft of the original Bond, and of the ownership thereof, and also such security and indemnity as may be required by the laws of the State or such greater amount as may be required by the School District and the Registrar. Any duplicate Bond issued under the provisions of this Section in exchange and substitution for any defaced,

mutilated or partly destroyed Bond or in substitution for any allegedly lost, stolen or wholly-destroyed Bond shall be entitled to the identical benefits under this Resolution as was the original Bond in lieu of which such duplicate Bond is issued, and shall be entitled to equal and proportionate benefits with all the other Bonds of the same series issued hereunder.

All expenses necessary for the providing of any duplicate Bond shall be borne by the applicant therefor.

Section 7. Execution of Bonds. The Bonds shall be executed in the name of the School District with the manual or facsimile signature of the 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 Bonds shall not be valid or become obligatory for any purpose unless there shall have been endorsed thereon a certificate of authentication. Each Bond shall bear a certificate of authentication manually executed by the Registrar/Paying Agent in substantially the form set forth herein.

Section 8. Form of Bonds. The Bonds shall be in substantially the form set forth as Appendix A attached hereto.

Section 9. Eligible Securities. The Bonds initially issued (the "Initial Bonds") will be eligible securities for the purposes of the book-entry system of transfer maintained by The Depository Trust Company, New York, New York ("DTC"), and transfers of beneficial ownership of the Initial Bonds shall be made only through DTC and its participants in accordance with rules specified by DTC. Such beneficial ownership must be of $5,000 principal amount of Bonds of the same maturity or any integral multiple of $5,000.

The Initial Bonds shall be issued in fully-registered form, one Bond for each of the maturities of the Bonds, in the name of Cede & Co., as the nominee of DTC. When any principal of or interest on the Initial Bonds becomes due, the School District shall transmit to DTC an amount equal to such installment of principal and interest. DTC shall remit such payments to the beneficial owners of the Bonds or their nominees in accordance with its rules and regulations.

Notices of redemption of the Initial Bonds or any portion thereof shall be sent to DTC in accordance with the provisions of this Resolution.

If (a) DTC determines not to continue to act as securities depository for the Bonds, or (b) the School District has advised DTC of its determination that DTC is incapable of discharging its duties, the School District shall attempt to retain another qualified securities depository to replace DTC. Upon receipt by the School District of the Initial Bonds together with an assignment duly executed by DTC, the School District shall execute and deliver to the successor securities depository Bonds of the same principal amount, interest rate and maturity registered in the name of such successor.

If the School District is unable to retain a qualified successor to DTC or the School District has determined that it is in its best interest not to continue the book-entry system of transfer or that interests of the beneficial owners of the Bonds might be adversely affected if the book-entry system of transfer is continued (the School District undertakes no obligation to make any investigation to determine the occurrence of any events that would permit it to make any such determination), and has made provision to so notify beneficial owners of the Bonds by mailing an appropriate notice to DTC, upon receipt by the School District of the Initial Bonds together with an assignment duly executed by DTC, the School District shall execute, authenticate and deliver to the DTC participants Bonds in fully-registered form, in substantially the form set forth in Section 8 of this Resolution in the denominations of any integral multiple of $5,000.

Section 10. Security for the Bonds. The full faith, credit, resources and taxing power of the School District are hereby irrevocably pledged for the payment of the principal of and interest on the Bonds as they respectively mature and to create such sinking fund as may be necessary therefor. There shall be levied annually by the Auditors of Lexington County and Richland County (the "Auditors") and collected by the Treasurers of Lexington County and Richland County (the "Treasurers") 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 of and interest on the Bonds as they respectively mature and to create such sinking fund as may be necessary therefor.

The Auditors and Treasurers shall be notified as to the delivery of and payment for the Bonds 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 of and interest on the Bonds as they respectively mature and to create such sinking fund as may be necessary therefor.

Section 11. Defeasance. The obligations of the School District under this Resolution and the pledges, covenants and agreements of the School District herein made or provided for, shall be fully discharged and satisfied as to any portion of the Bonds, and such Bond or Bonds shall no longer be deemed to be outstanding hereunder when:

(a) such Bond or Bonds shall have been purchased by the School District and surrendered to the School District for cancellation or otherwise surrendered to the School District or the Paying Agent and is canceled or subject to cancellation by the School District or the Paying Agent; or

(b) payment of the principal of and interest on such Bonds either (i) shall have been made or caused to be made in accordance with the terms thereof, or (ii) shall have been provided for by irrevocably depositing with a corporate trustee in trust and irrevocably set aside exclusively for such payment (1) moneys sufficient to make such payment or (2) Government Obligations (hereinafter defined) maturing as to principal and interest in such amounts and at such times as will ensure the availability of sufficient moneys to make such payment and all necessary and proper fees, compensation and expenses of the corporate trustee. At such time as the Bonds shall no longer be deemed to be outstanding hereunder, such Bonds shall cease to draw interest from the due date thereof and, except for the purposes of any such payment from such moneys or Government Obligations as set forth in (ii) above, shall no longer be secured by or entitled to the benefits of this Resolution.

"Government Obligations" shall mean any of the following:

(i) direct obligations of the United States of America or agencies thereof or obligations, the payment of principal or interest on which, in the opinion of the Attorney General of the United States, is fully and unconditionally guaranteed by the United States of America; and

(ii) non-callable, U.S. Treasury Securities - State and Local Government Series (SLGS).

(c) Such Bond or Bonds shall be defeased as provided in Section 11-14-110 of the S.C. Code as such may be amended from time to time.

Section 12. Exemption from State Taxes. Both the principal of and interest on the Bonds shall be exempt, in accordance with the provisions of Section 12-2-50 of the Code of Laws of South Carolina 1976, as amended, 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 13. Sale of Bonds; Form of Notice of Sale. The Bonds shall be sold at public sale. A Notice of Sale shall be distributed to prospective bidders and a summary of such Notice of Sale shall be published in a newspaper having general circulation in the State, not less than seven (7) days prior to the date set for such sale. The Notice of Sale shall be in substantially the form set forth as Appendix B attached hereto.

Section 14. Preliminary and Official Statement. The Board hereby authorizes and directs the Superintendent to prepare, or cause to be prepared, a Preliminary Official Statement to be distributed to prospective purchasers of the Bonds together with the Notice of Sale. The Board authorizes the Superintendent to designate the Preliminary Official Statement as "near final" for purposes of Rule 15c2-12 promulgated by the Securities and Exchange Commission (the "Rule"). The Superintendent is further authorized to see to the completion of the final form of the Official Statement upon the sale of the Bonds so that it may be provided to the purchaser of the Bonds.

Section 15. Filings with Central Repository. In compliance with Section 11-1-85 of the S.C. Code, if the Bonds are issued as tax-exempt, 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 16. Continuing Disclosure. In compliance with the Rule, if the Bonds are publicly-traded, the School District covenants and agrees for the benefit of the holders from time to time of the Bonds to execute and deliver prior to closing, and to thereafter comply with the terms of, a Continuing Disclosure Certificate in substantially the form appearing as Appendix C to this Resolution. In the event of a failure of the School District to comply with any of the provisions of the Continuing Disclosure Certificate, an event of default under this Resolution shall not be deemed to have occurred. In such event, the sole remedy of any bondholder or beneficial owner shall be an action to compel performance by the School District.

Section 17. Deposit and Use of Proceeds. The proceeds shall be deposited with the Lexington County Treasurer in a special fund to the credit of the School District and shall be applied solely to the purposes for which the Bonds have been issued, including payment of costs of issuance.

Section 18. Reimbursement of Certain Expenditures. The Board hereby declares that this Resolution shall constitute its declaration of official intent pursuant to Regulation § 1.150-2 to reimburse the School District from the proceeds of the Bonds for expenditures with respect to the Projects (the "Expenditures"). The School District anticipates incurring Expenditures with respect to the Projects prior to the issuance by the School District of the Bonds for such purposes. To be eligible for reimbursement of the Expenditures, the payment date of such Expenditures must be subsequent to the date occurring sixty (60) days prior to the adoption of this resolution and 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 the Projects was placed in service, but in no event more than three (3) years after the original Expenditures. The Expenditures are incurred solely to acquire, construct or rehabilitate property having a reasonably expected economic life

of at least one (1) year. The source of funds for the Expenditures with respect to the Projects will be the School District's general reserve funds or other legally-available funds.

Section 19. Tax Covenants. The School District hereby covenants and agrees with the holders of the Bonds that it will not take any action which will, or fail to take any action which failure will, cause interest on the Bonds to become includable in the gross income of the bondholders for federal income tax purposes pursuant to the provisions of the Internal Revenue Code of 1986, as amended (the "Code"), and regulations promulgated thereunder in effect on the date of original issuance of the Bonds. The School District further covenants and agrees with the holders of the Bonds that no use of the proceeds of the Bonds shall be made which, if such use had been reasonably expected on the date of issue of the Bonds would have caused the Bonds to be "arbitrage bonds," as defined in Section 148 of the Code, and to that end the School District hereby shall:

(a) comply with the applicable provisions of Sections 103 and 141 through 150 of the Code and any regulations promulgated thereunder so long as the Bonds are 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 Code relating to required rebates of certain amounts to the United States; and

(c) make such reports of such information at the time and places required by the Code.

Section 20. Miscellaneous. The Board hereby authorizes the Chair of the Board, the Secretary of the Board, the Superintendent and the Chief Financial Officer (or the equivalent thereto) to execute such documents and instruments as may be necessary to effect the issuance of the Bonds.

The Board hereby authorizes the engagement of Burr & Forman LLP as Bond Counsel in regard to the Bonds. The Superintendent is authorized to execute such contract, document or engagement letter as may be necessary and appropriate to effectuate said engagement.

All rules, regulations, resolutions and parts thereof, procedural or otherwise, in conflict herewith or the proceedings authorizing the issuance of the Bonds are, 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 _____, 2023.

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

_____
Chair, Board of Trustees

(SEAL)

ATTEST:

_____
Secretary, Board of Trustees

**Appendix A**

**FORM OF BOND**

UNITED STATES OF AMERICA
STATE OF SOUTH CAROLINA
SCHOOL DISTRICT NO. 5 OF LEXINGTON COUNTY AND RICHLAND COUNTY
GENERAL OBLIGATION BONDS, SERIES 2023

No. R-

| INTEREST RATE | MATURITY DATE | ORIGINAL ISSUE DATE | CUSIP |
|---|---|---|---|
| % | | | |

REGISTERED HOLDER:

PRINCIPAL AMOUNT: DOLLARS

KNOW ALL MEN BY THESE PRESENTS, that School District No. 5 of Lexington County and Richland County, South Carolina (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, upon presentation and surrender of this Bond at the principal office of _____ in _____ (the "Paying Agent"), 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 _____ 1, _____ and semiannually thereafter on _____ 1 and _____ 1 of each year, until this Bond matures, and shall be payable by electronic transfer or 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 _____ in _____ (the "Registrar"), at the close of business on the fifteenth (15th) day of the calendar month preceding each semiannual interest 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 or draft as set forth above.

This Bond shall not be entitled to any benefit under the Resolution of the School District authorizing the Bonds, 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 of and interest on this Bond as it respectively matures and for the creation of such sinking fund as may be necessary to provide for the prompt payment thereof, 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 Lexington County and Richland County and collected by the Treasurers of Lexington County and Richland County, 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 of and interest on this Bond as it respectively matures and to create such sinking fund as may be necessary to provide therefor.

The Bonds are being issued by means of a book-entry system with no physical distribution of bond certificates to be made except as provided in the Resolution. One bond certificate with respect to each date on which the Bonds are stated to mature, registered in the name of the securities depository nominee, is being issued and required to be deposited with the securities depository and immobilized in its custody. The book-entry system will evidence positions held in the Bonds by the securities depository's participants, beneficial ownership of the Bonds in the principal amount of any integral multiple of $5,000 being evidenced in the records of such participants. Transfers of ownership shall be effected on the records of the securities depository and its participants pursuant to rules and procedures established by the securities depository and its participants. The School District and the Registrar/Paying Agent will recognize the securities depository nominee, while the registered owner of this bond, as the owner of this bond for all purposes, including payments of principal of and redemption premium, if any, and interest on this bond, notices and voting. Transfer of principal and interest payments to participants of the securities depository will be the responsibility of the securities depository, and transfer of principal, redemption premium, if any, and interest payments to beneficial owners of the Bonds by participants of the securities depository will be the responsibility of such participants and other nominees of such beneficial owners. The School District will not be responsible or liable for such transfers of payments or for maintaining, supervision or reviewing the records maintained by the securities depository, the securities depository nominee, its participants or persons acting through such participants. While the securities depository nominee is the owner of this bond, notwithstanding, the provision hereinabove contained, payments of principal of, redemption premium, if any, and interest on this bond shall be made in accordance with existing arrangements between the Registrar/Paying Agent or its successors under the Resolution and the securities depository.

This Bond is one of a series of Bonds of like date of original issue, tenor and effect, except as to number, date of maturity, denomination and rate of interest, aggregating _____ and no/100 Dollars ($_____), issued pursuant to and in accordance with Article X, Section 15 of the Constitution of the State of South Carolina, 1895, as amended (the "Constitution"); 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 a Resolution duly adopted by the Board of Trustees of the School District.

The Bonds will not be subject to redemption prior to their stated maturities.

This Bond is transferable as provided in the Resolution, 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 or Bonds 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 (the "State"), 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 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; 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 on this Bond as it respectively matures and to create such sinking fund as may be necessary therefor.

IN WITNESS WHEREOF, SCHOOL DISTRICT NO. 5 OF LEXINGTON COUNTY AND RICHLAND COUNTY, SOUTH CAROLINA, has caused this Bond to be signed with the facsimile signature of the Chair of the Board of Trustees of the School District, attested by the 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

ATTEST:

_____
Secretary, Board of Trustees

[FORM OF REGISTRAR'S CERTIFICATE OF AUTHENTICATION]

Date of Authentication:

This Bond is one of the Bonds described in the within-mentioned Resolution of 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 ENT - 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.

(FORM OF ASSIGNMENT)

FOR VALUE RECEIVED, the undersigned sells, assigns and transfers unto _____ (Name and Address of Transferee) _____the within Bond and does hereby irrevocably constitute and appoint _____ attorney to transfer the within Bond on the books kept for registration thereof, with full power of substitution in the premises.

Dated:_____

| | |
|---|---|
| _____ | _____ |
| Signature Guaranteed | (Authorized Officer) |
| _____ | _____ |
| Notice: Signature(s) must be guaranteed by an institution which is a participant in the Securities Transfer Agents Medallion Program ("STAMP") or similar program. | Notice: The signature to this assignment must correspond with the name of the registered holder as it appears upon the face of the within Bond in every particular, without alteration or enlargement or any change whatever. |

A copy of the final approving legal opinion to be rendered shall accompany each Bond and preceding the same a certificate shall appear, which shall be signed on behalf of the School District with a facsimile signature of the Secretary of the Board of Trustees of the School District. Said certificate shall be in substantially the following form:

IT IS HEREBY CERTIFIED that the following is a true and correct copy of the final legal opinion (except for date and letterhead) of Burr & Forman LLP, Columbia, South Carolina, approving the issue of the Bonds of which the within Bond is one, the original of which opinion was manually executed, dated and issued as of the date of delivery of and payment for the Bonds, and a copy of which is on file with School District No. 5 of Lexington County and Richland County, South Carolina.

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

By:_____
Secretary, Board of Trustees

**Appendix B**

## FORM OF OFFICIAL NOTICE OF SALE

$_____ GENERAL OBLIGATION BONDS, SERIES 2023,
SCHOOL DISTRICT NO. 5 OF LEXINGTON COUNTY AND
RICHLAND COUNTY, SOUTH CAROLINA

Date and Time of Sale: NOTICE IS HEREBY GIVEN that bids for the purchase of $_____ General Obligation Bonds, Series 2023 (the "Bonds"), of School District No. 5 of Lexington County and Richland County, South Carolina (the "School District") will be received by the Superintendent of the School District until ____ a.m. (South Carolina time) on _____, _____. _____ ___, 2023.

**THE SALE MAY BE CANCELLED OR POSTPONED OR ANY OTHER PROVISION OF THIS OFFICIAL NOTICE OF SALE MAY BE AMENDED BY THE SCHOOL DISTRICT UPON NO LESS THAN TWO HOURS PRIOR NOTICE COMMUNICATED ELECTRONICALLY. IF SUCH A POSTPONEMENT, CHANGE OR AMENDMENT OCCURS, BIDS WILL BE RECEIVED IN ACCORDANCE WITH THIS OFFICIAL NOTICE OF SALE, AS MODIFIED BY SUCH NOTICE.**

Electronic Bids Only: Electronic proposals must be submitted through IHS Markit's Parity/BidComp Competitive Bidding System ("Parity"). No electronic bids from any other providers of electronic bidding services will be accepted. Information about the electronic bidding services of Parity may be obtained from Parity, 450 West 33rd Street, 5th Floor, New York, New York 10001, Customer Support, telephone (212) 849-5021.

The Bonds: Interest on the Bonds will be payable at maturity on March 1, 2024. The Bonds will be dated their date of delivery, on or about _____, 2023, and will mature on March 1, 2024

Adjustment of Par Amount: If, after final computation of the proposals, the School District determines in its sole discretion that the funds necessary to accomplish the purposes for which the Bonds are being issued are either more or less than the proceeds of the sale of the amount of the Bonds as shown in this Notice of Sale, it reserves the right either to decrease or increase the principal amount of the Bonds (all calculations to be rounded to the nearest $5,000), provided that any such decrease or increase shall not exceed 15% of the par amount unless approved by the winning bidder. Such adjustment(s), if any, shall be made within twenty-four (24) hours of the award of the Bonds. In order to calculate the yield on the Bonds for federal tax law purposes and as a condition precedent to the award of the Bonds, bidders must disclose to the School District in connection with their respective bids the price (or yield to maturity) at which the Bonds will be reoffered to the public. Such adjustments, if any, will reflect changes in the dollar amount of the underwriter's discount and the original issue premium, if any, but will not change the selling compensation per $1,000 of par amount of the Bonds from the selling compensation per $1,000 that would have been received based on the purchase price and the initial reoffering prices in the winning bid.

In the event of any adjustment of the par amount of the Bonds as described herein, no rebidding or recalculation of the proposals submitted will be required or permitted. Nevertheless, the award of the Bonds will be made to the bidder whose proposal produces the lowest true interest cost solely on the basis of the Bonds offered, without taking into account any adjustment in the amount of the Bonds pursuant to this paragraph.

Book-Entry-Only Bonds: The Bonds will be issued in fully-registered form. One Bond will be issued to and registered in the name of Cede & Co., as nominee of The Depository Trust Company, New York, New York ("DTC"), as registered owner of the Bonds and the Bonds will be immobilized in the custody of DTC. DTC will act as securities depository for the Bonds. Individual purchases will be made in book-entry-only form, in the principal amount of $5,000 or any integral multiple thereof not exceeding the principal amount of the Bonds. Purchasers will not receive physical delivery of certificates representing their interest in the Bonds purchased. The winning bidder, as a condition to delivery of the Bonds, will be required to deposit the Bond certificate with DTC.

Redemption Provisions: The Bonds will not be subject to redemption prior to their stated maturities.

Registrar/Paying Agent: _____ in _____ shall serve as Registrar/Paying Agent for the Bonds.

Bid Requirements: Bidders shall specify the rate of interest per annum which the Bonds are to bear, to be expressed in multiples of 1/20 or 1/8 of 1%. The interest rate for the Bonds can exceed five percent (5%) per annum or be less than four percent (4%) per annum. The TIC (as defined below) shall not exceed 2.5%. A BID FOR LESS THAN ALL THE BONDS OR A BID AT A PRICE LESS THAN PAR WILL NOT BE CONSIDERED.

Award of Bid: The Bonds will be awarded to the bidder offering to purchase the Bonds at the lowest true interest cost to the School District, such cost to be determined in accordance with the true interest cost (TIC) method. The true interest cost will be determined by computing the total dollar interest cost from the date of the Bonds to the respective maturity dates (based on a 360-day year of 12 months of 30 days each) and deducting therefrom the amount of the premium offered, if any, over and above the principal amount. In the event of a tie bid, the winning bid will be awarded by lot. The School District reserves the right to reject any and all bids or to waive irregularities in any bid. Bids will be accepted or rejected no later than 3:00 p.m., South Carolina time, on the date of sale.

Good Faith Deposit: No good faith deposit is required.

Official Statement: Upon the award of the Bonds, the School District will prepare an official statement (the "Official Statement") in substantially the same form as the preliminary official statement (the "Preliminary Official Statement") subject to minor additions, deletions and revisions as required to complete the Official Statement. Within seven (7) business days after the award of the Bonds, the School District will deliver the Official Statement to the successful bidder in sufficient quantity to comply with Rule G-32 of the Municipal Securities Rulemaking Board.

Security: The Bonds shall constitute binding general obligations of the School District, and the full faith, credit, resources and taxing power of the School District are irrevocably pledged for the payment of the principal and interest on the Bonds as they respectively mature and to create such sinking fund as may be necessary therefor. There shall be levied and collected annually upon all taxable property of the School District a tax, without limitation as to rate or amount, sufficient for such purposes.

Continuing Disclosure: In order to assist the bidders in complying with Rule 15c2-12(b)(5) promulgated by the Securities and Exchange Commission, the School District will undertake, pursuant to a resolution and a Continuing Disclosure Certificate to provide certain annual financial information and notices of the occurrence of certain events. A description of this undertaking is set forth in the Preliminary Official Statement and will also be set forth in the Official Statement.

Legal Opinion: The School District shall furnish upon delivery of the Bonds the final approving opinion of Burr & Forman LLP, Columbia, South Carolina, which opinion shall accompany each Bond, together with the usual closing documents, including a certificate that no litigation is pending affecting the Bonds.

Issue Price Certificate: The winning bidder shall assist the School District in establishing the issue price of the Bonds and shall execute and deliver to the School District at delivery an "issue price" certificate setting forth the reasonably expected initial offering price to the public, with such modifications as may be appropriate or necessary, in the reasonable judgment of the winning bidder, the School District and co-Bond Counsel. A sample copy of the certificate may be obtained from Burr & Forman LLP.

The School District intends that the provisions of Treasury Regulation Section 1.148-1(f)(3)(i) (defining "competitive sale" for purposes of establishing the issue price of the Bonds) will apply to the initial sale of the Bonds (the "Competitive Sale Requirements") because:

(1) the School District shall disseminate this Notice of Sale to potential underwriters in a manner that is reasonably designed to reach potential underwriters;

(2) all bidders shall have an equal opportunity to bid;

(3) the School District may receive bids from at least three underwriters of municipal bonds who have established industry reputations for underwriting new issuances of municipal bonds; and

(4) the School District anticipates awarding the sale of the Bonds to the bidder who submits a firm offer to purchase the Bonds at the highest price (or lowest interest cost), as set forth in this Notice of Sale.

Any bid submitted pursuant to this Notice of Sale shall be considered a firm offer for the purchase of the Bonds, as specified in the bid.

In the event that the Competitive Sale Requirements are not satisfied, the School District shall so advise the winning bidder. The School District may determine to treat the initial offering price to the public as of the sale date of the Bonds as the issue price of the Bonds (the "Hold-the-Offering-Price Rule"). The School District shall promptly advise the winning bidder, at or before the time of award of the Bonds, that the Bonds shall be subject to the Hold-the-Offering-Price Rule. Bids will not be subject to cancellation in the event that the School District determines to apply the Hold-the-Offering-Price Rule to the Bonds. Bidders should prepare their bids on the assumption that the Bonds will be subject to the Hold-the-Offering-Price Rule in order to establish the issue price of the Bonds.

By submitting a bid, the winning bidder shall (1) confirm that the underwriters have offered or will offer the Bonds to the public on or before the date of award at the offering price (the "Initial Offering Price"), or at the corresponding yield, set forth in the bid submitted by the winning bidder and (2) agree, on behalf of the underwriters participating in the purchase of the Bonds, that the underwriters will neither offer nor sell unsold Bonds to which the Hold-the-Offering-Price Rule shall apply to any person at a price that is higher than the Initial Offering Price to the public during the period starting on the sale date and ending on the earlier of the following:

(1) the close of the fifth (5th) business day after the sale date; or

(2) the date on which the underwriters have sold at least 10% of the Bonds to the public at a price that is no higher than the Initial Offering Price to the public (the "10% Test").

The winning bidder will advise the School District promptly after the close of the fifth (5th) business day after the sale date whether it has when the underwriters have sold 10% of that maturity of the Bonds to the public at a price that is no higher than the Initial Offering Price to the public.

The School District acknowledges that, in making the representation set forth above, the winning bidder will rely on (1) the agreement of each underwriter to comply with the Hold-the-Offering-Price Rule, as set forth in an agreement among underwriters and the related pricing wires, (2) in the event a selling group has been created in connection with the initial sale of the Bonds to the public, the agreement of each dealer who is a member of the selling group to comply with the Hold-the-Offering-Price Rule, as set forth in a selling group agreement and the related pricing wires, and (3) in the event that an underwriter is a party to a retail distribution agreement that was employed in connection with the initial sale of the Bonds to the public, the agreement of each broker-dealer that is a party to such agreement to comply with the Hold-the-Offering-Price Rule, as set forth in the retail distribution agreement and the related pricing wires. The School District further acknowledges that each underwriter shall be solely liable for its failure to comply with its agreement regarding the Hold-the-Offering-Price Rule and that no underwriter shall be liable for the failure of any other underwriter, or of any dealer who is a member of a selling group, or of any broker-dealer that is a party to a retail distribution agreement to comply with its corresponding agreement regarding the Hold-the-Offering-Price Rule as applicable to the Bonds.

By submitting a bid, each bidder confirms that: (1) any agreement among underwriters, any selling group agreement and each retail distribution agreement (to which the bidder is a party) relating to the initial sale of the Bonds to the public, together with the related pricing wires, contains or will contain language obligating each underwriter, each dealer who is a member of the selling group, and each broker-dealer that is a party to such retail distribution agreement, as applicable, to (a) report the prices at which it sells to the public the unsold Bonds allotted to it until it is notified by the winning bidder that either the 10% Test has been satisfied as to the Bonds or all Bonds have been sold to the public and (b) comply with the Hold-the-Offering-Price Rule, if applicable, in each case if and for so long as directed by the winning bidder and as set forth in the related pricing wires, and (2) any agreement among underwriters relating to the initial sale of the Bonds to the public, together with the related pricing wires, contains or will contain language obligating each underwriter that is a party to a retail distribution agreement to be employed in connection with the initial sale of the Bonds to the public to require each broker-dealer that is a party to such retail distribution agreement to (a) report the prices at which it sells to the public the unsold Bonds allotted to it until it is notified by the winning bidder or such underwriter that either the 10% Test has been satisfied as to the Bonds or all Bonds have been sold to the public and (b) comply with the Hold-the-Offering-Price Rule, if applicable, in each case if and for so long as directed by the winning bidder or such underwriter and as set forth in the related pricing wires.

Sales of any Bonds to any person that is a related party to an underwriter shall not constitute sales to the public for purposes of this Notice of Sale. Further, for purposes of this Notice of Sale:

(1) "public" means any person other than an underwriter or a related party,

(2) "underwriter" means (a) any person that agrees pursuant to a written contract with the School District (or with the lead underwriter to form an underwriting

syndicate) to participate in the initial sale of the Bonds to the public and (b) any person that agrees pursuant to a written contract directly or indirectly with a person described in clause (a) to participate in the initial sale of the Bonds to the public (including a member of a selling group or a party to a retail distribution agreement participating in the initial sale of the Bonds to the public),

(3) a purchaser of any of the Bonds is a "related party" to an underwriter if the underwriter and the purchaser are subject, directly or indirectly, to (a) at least 50% common ownership of the voting power or the total value of their stock, if both entities are corporations (including direct ownership by one corporation of another), (b) more than 50% common ownership of their capital interests or profits interests, if both entities are partnerships (including direct ownership by one partnership of another), or (c) more than 50% common ownership of the value of the outstanding stock of the corporation or the capital interests or profit interests of the partnership, as applicable, if one entity is a corporation and the other entity is a partnership (including direct ownership of the applicable stock or interests by one entity of the other), and

(4) "sale date" means the date that the Bonds are awarded by the School District to the winning bidder.

Financial Advisor: PFM Financial Advisors LLC ("PFM") is acting as Financial Advisor (the "Financial Advisor") to the School District in connection with the issuance of the Bonds. PFM, in its capacity as Financial Advisor, has not verified and does not assume any responsibility for the information, covenants and representations contained in any of the legal documents with respect to the federal income tax status of the Bonds, or the possible impact of any present, pending or future actions taken by any legislative or judicial bodies or rating agencies.

Delivery: The Bonds will be delivered on or about _____, 2023, in New York, New York, at the expense of the School District, or at such other place as may be agreed upon with the purchasers at the expense of the purchaser. The purchase price then due must be paid in federal funds or other immediately available funds.

CUSIP Numbers: It is anticipated that CUSIP identification numbers will be set forth on the Bonds, but neither the failure to print such numbers on any Bond nor any error with respect thereto shall constitute cause for failure or refusal by the purchaser thereof to accept delivery of and pay for the Bonds in accordance with the terms of its proposal. The Financial Advisor will request the assignment of CUSIP numbers prior to the sale of the Bonds; however, the CUSIP Service Bureau charge for the assignment of said numbers will be the responsibility of and will be paid for by the successful bidder.

Additional Information: The Preliminary Official Statement with respect to the Bonds is available via the internet at www.munios.com and will be furnished to any person interested in bidding for the Bonds. The Preliminary Official Statement shall be reviewed by bidders prior to submitting a bid. Bidders may not rely on this Notice of Sale as to the complete information concerning the Bonds. For additional information relating to or to request a copy of the Preliminary Official Statement, please contact the School District's Bond Counsel, Francenia B. Heizer, Esquire, Burr & Forman LLP, telephone (803) 799-9800, e-mail: fheizer@burr.com or the Financial Advisor, Elise Lomel or Jay Glover, PFM Financial Advisors LLC, telephone (404) 410-2227 or (407) 406-5760, respectively, e-mail: lomele@pfm.com or gloverj@pfm.com, respectively.

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

**Appendix C**

## FORM OF CONTINUING DISCLOSURE CERTIFICATE

This Continuing Disclosure Certificate (the "Disclosure Certificate") is executed and delivered by School District No. 5 of Lexington County and Richland County, South Carolina (the "School District") in connection with the issuance of $_____ General Obligation Bonds, Series 2023, School District No. 5 of Lexington County and Richland County, South Carolina (the "Bonds"). The Bonds are being issued pursuant to a Resolution adopted by the Board of Trustees of the School District (the "Resolution"). The School District covenants and agrees as follows:

SECTION 1. Purpose of the Disclosure Certificate. This Disclosure Certificate is being executed and delivered by the School District for the benefit of the holders of the Bonds and in order to assist the Participating Underwriter (defined below) in complying with the Rule (defined below).

SECTION 2. Definitions. The following capitalized terms shall have the following meanings:

"Annual Report" shall mean any Annual Report provided by the School District pursuant to, and as described in, Sections 3 and 4 of this Disclosure Certificate.

"Dissemination Agent" shall mean the School District or any successor Dissemination Agent designated in writing by the School District and which has filed with the School District a written acceptance of such designation.

"Financial Obligation" is defined by the Rule as and for purposes of this Disclosure Certificate shall mean (1) a debt obligation, (2) a derivative instrument entered into in connection with, or pledged as security or a source of payment for, an existing or planned debt obligation, or (3) a guarantee of either of the foregoing; provided, however, that a "Financial Obligation" shall not include municipal securities as to which a final official statement has been provided to the Municipal Securities Rulemaking Board consistent with the Rule.

"Listed Events" shall mean any of the events listed in Section 5(a) of this Disclosure Certificate.

"National Repository" shall mean for purposes of the Rule, the Electronic Municipal Market Access (EMMA) system created by the Municipal Securities Rulemaking Board.

"Repository" shall mean the National Repository and each State Depository, if any.

"Participating Underwriter" shall mean _____ and any other original underwriter of the Bonds required to comply with the Rule in connection with offering of the Bonds.

"Rule" shall mean Rule 15c2-12(b)(5) promulgated by the Securities and Exchange Commission under the Securities Exchange Act of 1934, as the same may be amended from time to time.

"State Depository" shall mean any public or private repository or entity designated by the State of South Carolina as a state depository for the purpose of the Rule. As of the date of this Certificate, there is no State Depository.

SECTION 3. Provision of Annual Reports.

(a) The School District shall, or shall cause the Dissemination Agent to provide, not later than February 1 of each year, commencing in 2024, to the Repository an Annual Report which is consistent with the requirements of Section 4 of this Disclosure Certificate. Not later than fifteen (15) business days prior to such date the School District shall provide the Annual Report to the Dissemination Agent, if other than the School District; provided, that if the audited financial statements required pursuant to Section 4 hereof to be included in the Annual Report are not available for inclusion in the Annual Report as of such date, unaudited financial statements of the School District may be included in such Annual Report in lieu thereof, and the School District shall replace such unaudited financial statements with audited financial statements within fifteen (15) days after such audited financial statements become available for distribution. The Annual Report may be submitted as a single document or as separate documents comprising a package, and may cross-reference other information as provided in Section 4 of this Disclosure Certificate; provided that the audited financial statements of the School District may be submitted separately from the balance of the Annual Report.

(b) If the School District is unable to provide to the Repository an Annual Report by the date required in subsection (a), the School District shall send a notice to the Repository, in substantially the form attached hereto as Exhibit A.

(c) The Dissemination Agent shall:

(1) determine each year prior to the date for providing the Annual Report the name and address of the Repository; and

(2) if the Dissemination Agent is other than the School District, file a report with the School District and (if the Dissemination Agent is not the Registrar) the Registrar certifying whether the Annual Report has been provided pursuant to this Disclosure Certificate, and, if provided, stating the date it was provided, and listing the Repository to which it was provided.

SECTION 4. Content of Annual Reports. The School District's Annual Report shall contain or incorporate by reference the most recent audited financial statements, which shall be prepared in conformity with generally accepted accounting principles (or, if not in such conformity, to be accompanied by a qualitative discussion of the differences in the accounting principles and the impact of the change in the accounting principles on the presentation of the financial information) applicable to governmental entities such as the School District, and shall, in addition, contain or incorporate by reference the following information for the most recently completed fiscal year:

(a) School District enrollment;
(b) Total state appropriations subject to withholding under Article X, Sec. 15, South Carolina Constitution;
(c) Funding under the Aid to Classrooms program and the Education Finance Act;
(d) Outstanding General Obligation Indebtedness of the School District;
(e) Market Value/Assessment Summary of taxable property in School District;
(f) Tax rate for School District;
(g) Tax collections for School District; and
(h) Ten largest taxpayers (including fee-in-lieu-of-tax) for School District.

Any or all of the items listed above may be incorporated by reference from other documents, including official statements of debt issues with respect to which the School District is an "obligated person" (as defined by the Rule), which have been filed with the Repository or the Securities and Exchange Commission. If the document incorporated by reference is a final official statement, it must be available from the Municipal Securities Rulemaking Board. The School District shall clearly identify each such other document so incorporated by reference.

SECTION 5. Reporting of Significant Events.

(a) Pursuant to the provisions of this Section 5, the School District shall give, or cause to be given, notice of the occurrence of any of the following events (the "Listed Events"):

(1) Principal and interest payment delinquencies;
(2) Non-payment related defaults;
(3) Unscheduled draws on debt service reserves reflecting financial difficulties;
(4) Unscheduled draws on credit enhancements reflecting financial difficulties;
(5) Substitution of credit or liquidity providers, or their failure to perform;
(6) Adverse tax opinions, the issuance by the Internal Revenue Service of proposed or final determinations of taxability, Notices of Proposed Issue (IRS Form 5701-TEB) or other material notices or determinations with respect to the tax status of the security, or other material events affecting the tax status of the security;
(7) Modifications to rights of security holders;
(8) Bond calls;
(9) Tender offers;
(10) Defeasances;
(11) Release, substitution, or sale of property securing repayment of the securities;
(12) Rating changes;
(13) Bankruptcy, insolvency, receivership or similar event of the School District;
(14) The consummation of a merger, consolidation, or acquisition involving the School District or the sale of all or substantially all of the assets of the School District other than in the ordinary course of business, the entry into a definitive agreement to undertake such an action or the termination of a definitive agreement relating to any such actions, other than pursuant to its terms;
(15) Appointment of a successor or additional trustee or the change of name of a trustee.
(16) Incurrence of a Financial Obligation of the School District; or agreement to covenants, events of default, remedies, priority rights, or other similar terms of a Financial Obligation of the School District, any of which affect security holders;
(17) Default, event of acceleration, termination event, modification of terms, or other similar events under the terms of a Financial Obligation of the School District, any of which reflect financial difficulties.

(b) Whenever the School District obtains knowledge of the occurrence of a Listed Event described in subsections (a)(2), (7), (8), (11), (14), (15) or (16) above, the School District shall as soon as possible determine if such event would be material under applicable federal securities laws. If the School District determines that knowledge of the occurrence of such event would be material under applicable federal securities laws, the School District shall promptly, and no later than ten business days after the occurrence of the event, file a notice of such occurrence with the Repository.

(c) Whenever the School District obtains knowledge of the occurrence of a Listed Event described in subsections (a)(1), (3), (4), (5), (6), (9), (10), (12), (13) or (17) above, the School District shall promptly, and no later than ten business days after the occurrence of the event, file a notice of such occurrence with the Repository.

(d) Notwithstanding the foregoing, notice of Listed Events described in subsections (a)(8), (9), and (10) above need not be given under this subsection any earlier than the notice (if any) of the underlying event is given to owners of affected Bonds. For the purposes of the event identified in (a)(13) above, the event is considered to occur when any of the following occur: the appointment of a receiver, fiscal agent or similar officer for the School District in a proceeding under the U.S. Bankruptcy Code or in any other proceeding under state or federal law in which a court or governmental authority has assumed jurisdiction over substantially all of the assets or business of the School District, or if such jurisdiction has been assumed by leaving the existing governing body and officials or officers in possession but subject to the supervision and orders of a court or governmental authority, or the entry of an order confirming a plan of reorganization, arrangement or liquidation by a court or governmental authority having supervision or jurisdiction over substantially all of the assets or business of the School District.

SECTION 6. Termination of Reporting Obligation. The School District's obligations under this Disclosure Certificate shall terminate upon the defeasance, prior redemption or payment in full of the Bond.

SECTION 7. Dissemination Agent. The School District may, from time to time, appoint or engage a Dissemination Agent to assist it in carrying out its obligations under this Disclosure Certificate, and may discharge any such Agent, with or without appointing a successor Dissemination Agent. The initial Dissemination Agent shall be the School District.

SECTION 8. Amendment; Waiver. Notwithstanding any other provision of this Disclosure Certificate, the School District may amend this Disclosure Certificate and any provision of this Disclosure Certificate may be waived, if such amendment or waiver is supported by an opinion of counsel expert in federal securities laws acceptable to the School District, to the effect that such amendment or waiver would not, in and of itself, cause the undertakings herein to violate the Rule if such amendment or waiver had been effective on the date hereof but taking into account any subsequent change in or official interpretation of the Rule.

SECTION 9. Additional Information. Nothing in this Disclosure Certificate shall be deemed to prevent the School District from disseminating any other information, using the means of dissemination set forth in this Disclosure Certificate or any other means of communication, or including any other information in any Annual Report or notice of occurrence of a Listed Event, in addition to that which is required by this Disclosure Certificate. If the School District chooses to include any information in any Annual Report or notice of occurrence of a Listed Event, in addition to that which is specifically required by this Disclosure Certificate, the School District shall have no obligation under this Certificate to update such information or include it in any future Annual Report or notice of occurrence of a Listed Event.

SECTION 10. Default. In the event of a failure of the School District, or the Dissemination Agent to comply with any provision of this Disclosure Certificate, any beneficial owner may take such actions as may be necessary and appropriate, including seeking injunctive relief or specific performance by court order, to cause the School District, or the Dissemination Agent, as the case may be, to comply with its obligations under this Disclosure Certificate. A default under this Disclosure Certificate shall not be deemed an event of default under the Resolution, and the sole remedy under this Disclosure Certificate

in the event of any failure of the School District, or the Dissemination Agent to comply with this Disclosure Certificate shall be an action to compel performance.

SECTION 11. Duties of Dissemination Agent. The provisions of this Section 11 shall apply if the School District is not the Dissemination Agent. The Dissemination Agent shall have only such duties as are specifically set forth in this Disclosure Certificate.

SECTION 12. Beneficiaries. This Disclosure Certificate shall inure solely to the benefit of the School District, the Dissemination Agent, the Participating Underwriter, and holders from time to time of the Bonds and shall create no rights in any other person or entity.

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

By:_____
Superintendent

Dated: _____ __, 2023

EXHIBIT A

NOTICE TO REPOSITORY OF FAILURE TO FILE ANNUAL REPORT

| | |
|---|---|
| Name of School District: | School District No. 5 of Lexington County and Richland County, South Carolina |
| Name of Bond Issue: | $_____ General Obligation Bonds, Series 2023, School District No. 5 of Lexington County and Richland County, South Carolina |
| Date of Issuance: | _____ __, 2023 |

NOTICE IS HEREBY GIVEN that School District No. 5 of Lexington County and Richland County, South Carolina (the "School District") has not provided an Annual Report with respect to the above-named Bonds as required by Sections 3 and 4 of the Continuing Disclosure Certificate executed and delivered by the School District as Dissemination Agent. The School District has notified us in writing that the Annual Report will be filed by _____.

Dated:_____

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

EXHIBIT J

# District or School Plans
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School Renewal Plan Signature Page
Assurances for Plans
Stakeholders Involvement for Plan
District Requested Plan Waiver
Needs Assessment Data
Executive Summary of Needs Assessment Data Findings

PERFORMANCE GOAL AREA (1) - School Climate

- School Climate Strategy 1
- School Climate Strategy 2
- School Climate Strategy 3
- School Climate Strategy 4
- School Climate Strategy 5
- School Climate Strategy 6

PERFORMANCE GOAL AREA (2) - Student Achievement

- Student Achievement Strategy 1
- Student Achievement Strategy 2
- Student Achievement Strategy 3
- Student Achievement Strategy 4
- Student Achievement Strategy 5
- Student Achievement Strategy 6

PERFORMANCE GOAL AREA (3) - Teacher Administrator Quality

- Teacher Administrator Quality Strategy 1
- Teacher Administrator Quality Strategy 2
- Teacher Administrator Quality Strategy 3
- Teacher Administrator Quality Strategy 4
- Teacher Administrator Quality Strategy 5
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PERFORMANCE GOAL AREA (4) - Gifted and Talented

- Gifted and Talented Strategy 1
- Gifted and Talented Strategy 2
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Read to Succeed
Gifted and Talented Required Tables (Districts only)
District Proficiency-Based System (Districts only)
District Summer School Programs Site Identification (Districts only)

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# School Renewal Plan Signature Page

## Strategic Plan for 5 Year Cycle: 2022/23 to 2026/27
## Upcoming School Year: 2022/23

| | |
|---|---|
| District: | School District 5 of Lexington and Richland Counties |
| SIDN: | 3205 |
| Plan Submission | School Utilizes Cognia |
| Address 1: | 1020 Dutch Fork Road |
| Address 2: | |
| City: | Irmo, SC |
| Zip Code: | 29063 |
| School Renewal Contact Person: | Vann Holden |
| School Plan Contact Phone: | 803-476-8189 |
| School Plan E-mail Address: | vholden@lexrich5.org |

Required Signature Page
The district strategic plan, or annual update, includes elements required by the Early Childhood Development and Academic Assistance Act of 1993 (Act 135) (S.C. Code Ann. §59-139-10 et seq. (Supp. 2004)), the Education Accountability Act of 1998 (EAA) (S.C. Code Ann. §59-18-1300 et seq. (Supp. 2004)), and SBE Regulation 43-261. The signatures of the chairperson of the board of trustees, the superintendent, the principal, and the district strategic planning contact, the district Read to Succeed Leadership Team Lead, and the district Gifted and Talented coordinator are affirmation of active participation of key stakeholders and alignment with Act 135 and EAA requirements.

Assurances for the District Strategic Plans
The assurance pages following this page have been completed and the district superintendent signature below attests that the school/district complies with all applicable assurances requirements including ACT 135 (S.C. Code Ann. §59-139-10 et seq. (Supp. 2004)); EAA (S.C. Code Ann. §59-18-1300 et seq. (Supp. 2004)); District and School Planning (SBE Regulation 43-261); Student Health and Fitness Act (S.C. Code Ann. § 59-10-330); Read to Succeed (S.C. Code Ann. § 59-155-180 et seq.); Gifted and Talented (SBE Regulation 43-220); and Proficiency-Based System Plans (SBE Regulation 43-234); and General Grant including Terms and Conditions for SCDE Grant Programs as seen on the following assurance pages.

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**Required Printed Names and Signatures**

| | | |
|---|---|---|
| ***Superintendent*** | | |
| Dr. Akil E. Ross, Sr.<br>Printed Name | Signature | Date |
| ***Principal*** | | |
| ***Chairperson, District Board of Trustees*** | | |
| Mrs. Rebecca Blackburn Hines<br>Printed Name | Signature | Date |
| ***District Read To Succeed Literacy Leadership Team Lead*** | | |
| Mrs. Tina McCaskill<br>Printed Name | Signature | Date |
| ***District Gifted and Talented Coordinator*** | | |
| Mrs. Lisa Duda<br>Printed Name | Signature | Date |
| ***District Strategic Planning Contact Person*** | | |
| Dr. Vann Holden<br>Printed Name | Signature | Date |

## Stakeholders Involvement for Plan

List the name of persons who were involved in the development of the District Strategic Plan. A participant for each numbered position is required.

| | Position | Name |
|---|---|---|
| 1. | Superintendent | Dr. Akil E. Ross, Sr. |
| 2. | Principal | Mr. Jason Pollock |
| 3. | Teacher | Mr. Reggie Salazar |
| 4. | Parent/Guardian | Ava R. Dean, BSN MPH |
| 5. | Community Member | Mrs. Lucy Bailey |
| 6. | Private School Representative | n/a |
| 7. | District Level Administrator | Dr. Vann Holden |
| 8. | Paraprofessional | Ms. Kim Weber |
| 9. | District Read To Succeed Literacy Leadership Team Lead | Mrs. Tina McCaskill |
| 10. | District Read To Succeed Literacy Leadership Team Member | Dr. Robin Cox |
| 11. | School Improvement Council Member | Mrs. Beth White |
| 12. | District Gifted and Talented Coordinator | Mrs. Lisa Duda |
| 13. | District Federal Programs Coordinator | Mrs. Lisa Duda |
| | **OTHERS:** (May include school board members, district or school administrators, students, PTO members, agency representatives, university partners, Head Start representatives, First Step representatives, etc.)<br>** Must include the School Literacy Leadership Team for Read to Succeed | |
| | Director of Communications | Mrs. Amanda Taylor |
| | Chief of Academics and Administration | Mrs. Anna M. Miller |
| | Chief Student Services and Planning Officer | Dr. Michael R. Harris |
| | Chief Human Resources Officer | Dr. Tamara D. Turner |
| | Chief Finance Officer | Ms. Maddison Paul |
| | Executive Director of Operations | Mr. David Weissman |

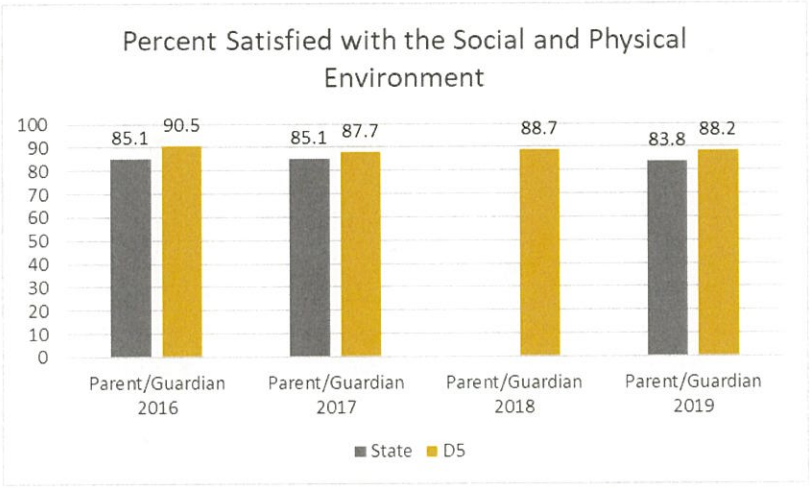
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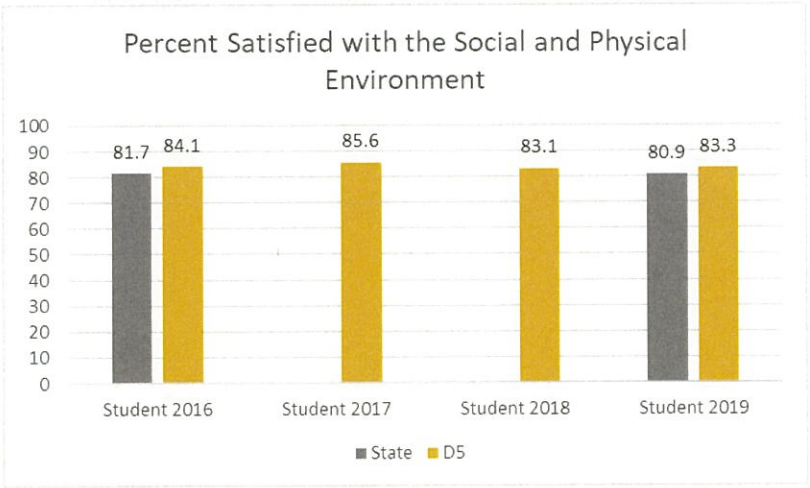
# NEEDS ASSESSMENT DATA

**Directions:** Provide additional school's needs assessment data including both formative and summative assessments used to gauge student learning, **especially if any performance goals are using data not found in the state report card.** (Charts, graphs, or other formats of data may be used.)

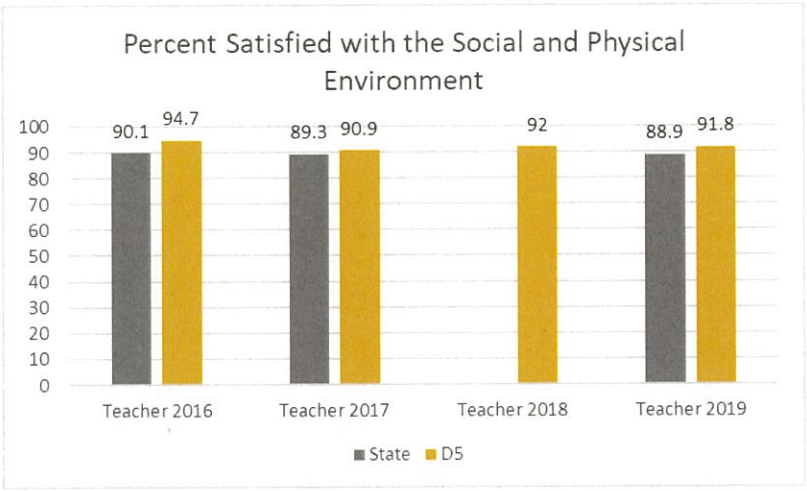
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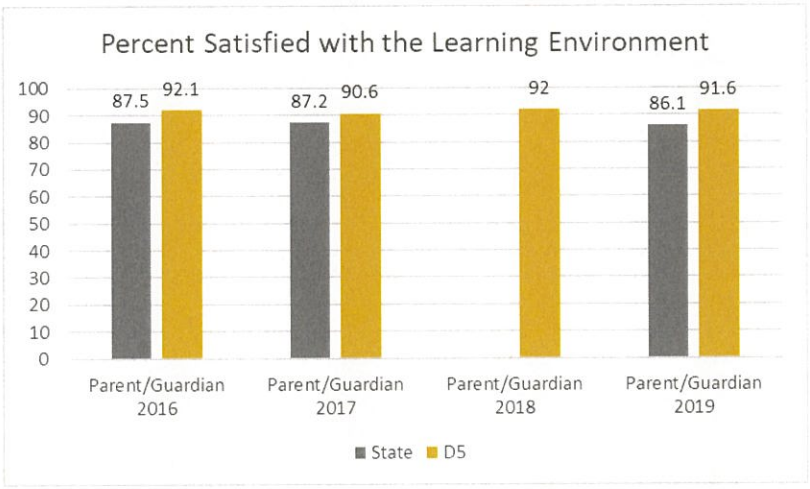
## School Climate

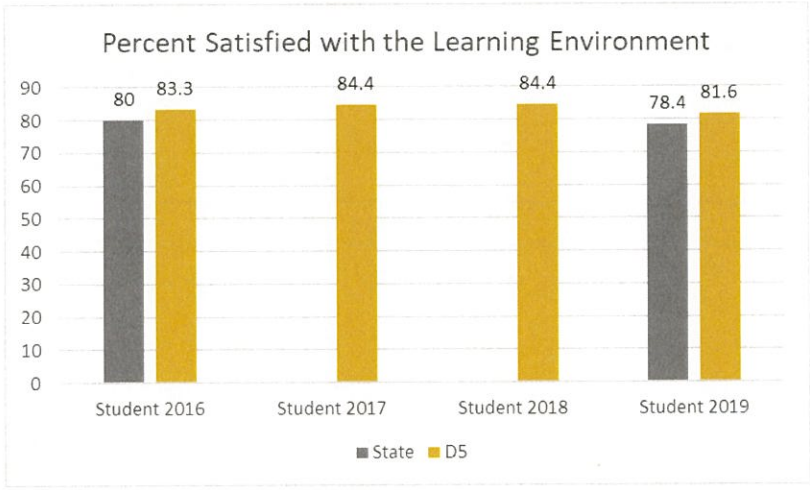


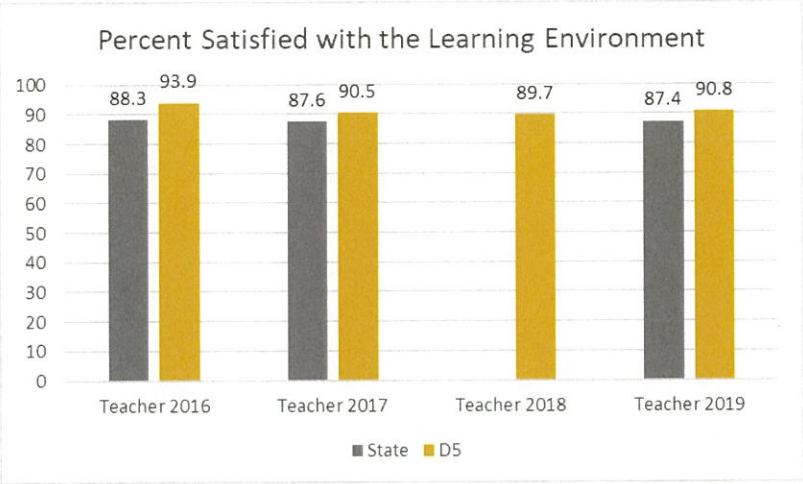

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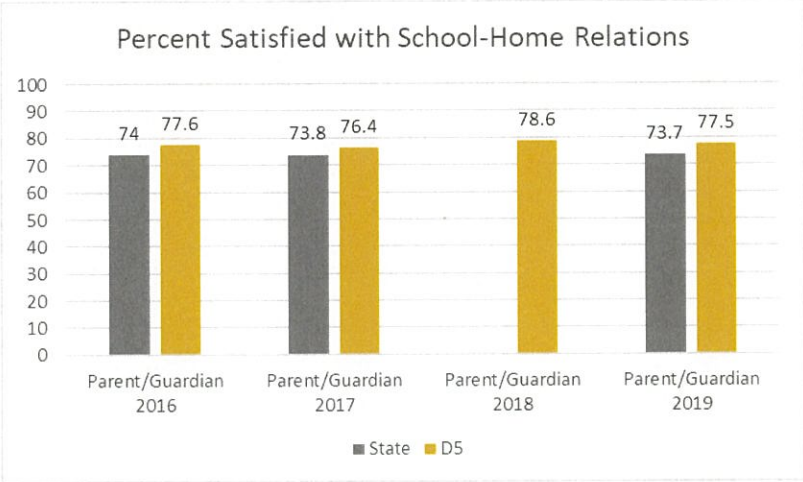


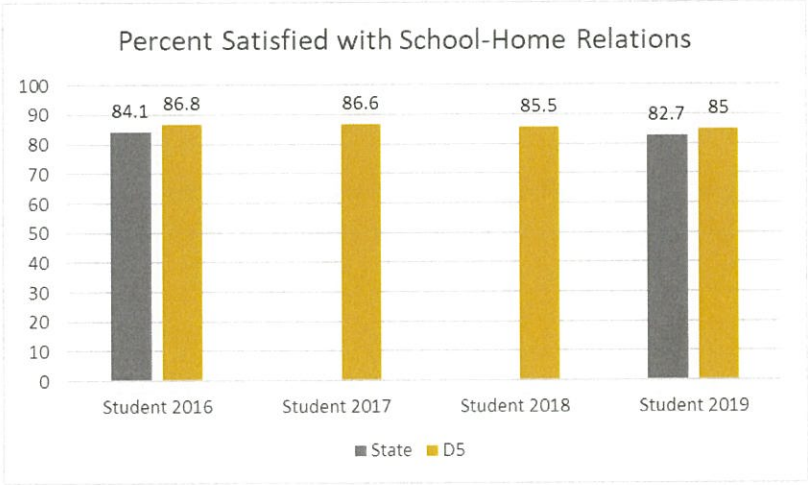



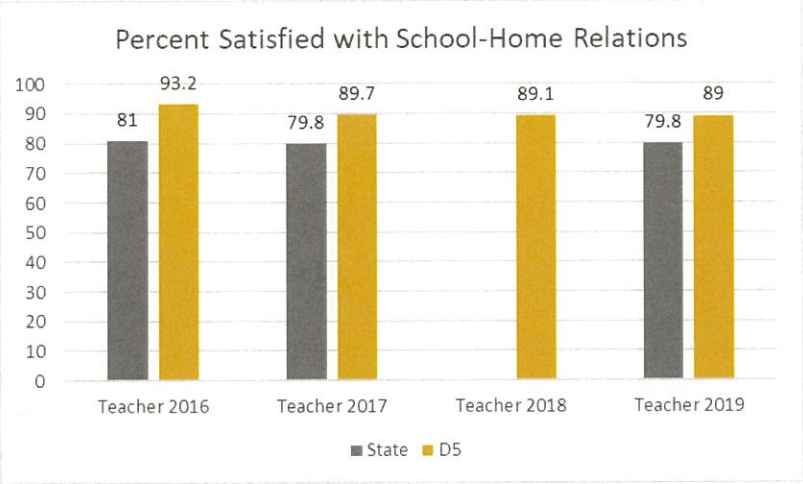

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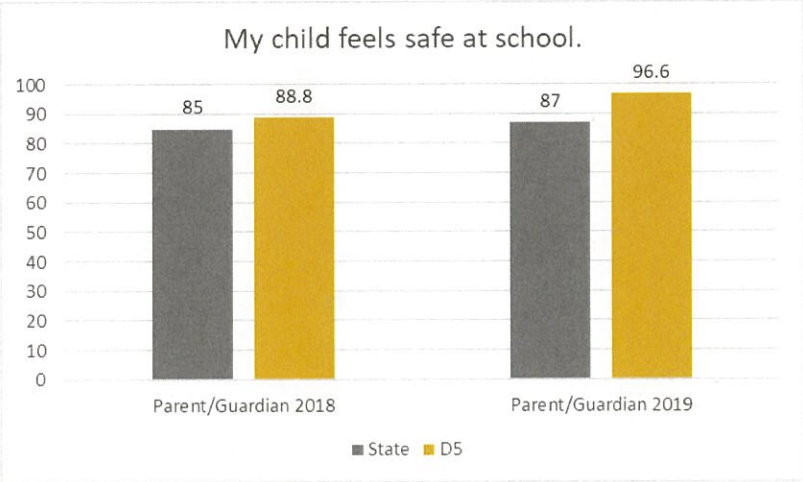


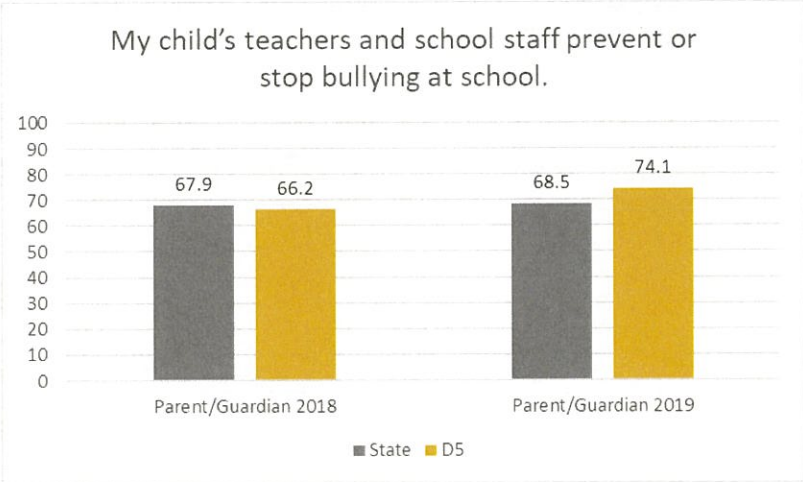



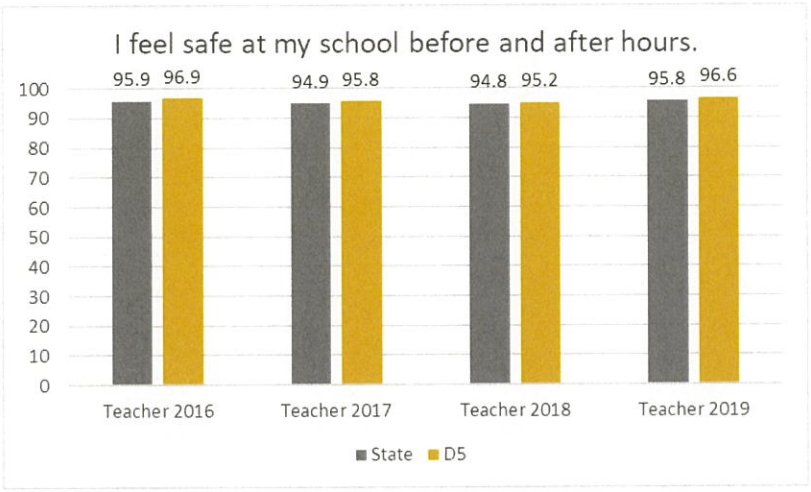

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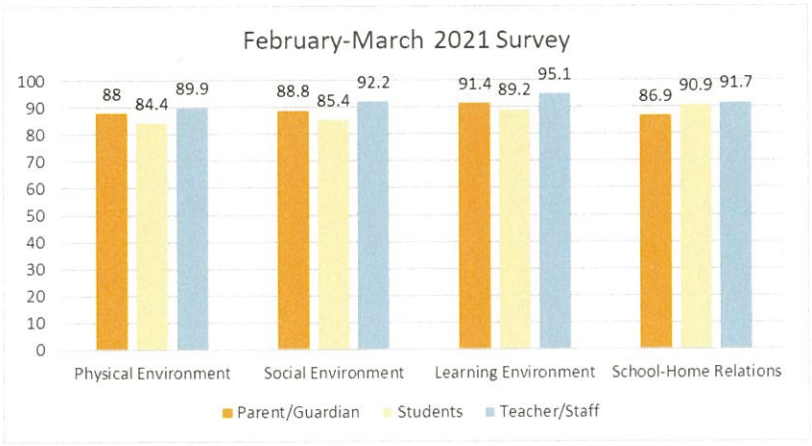


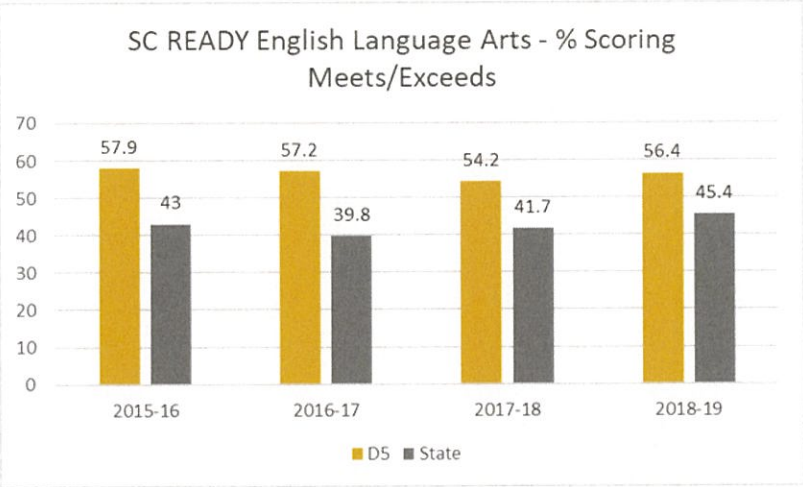

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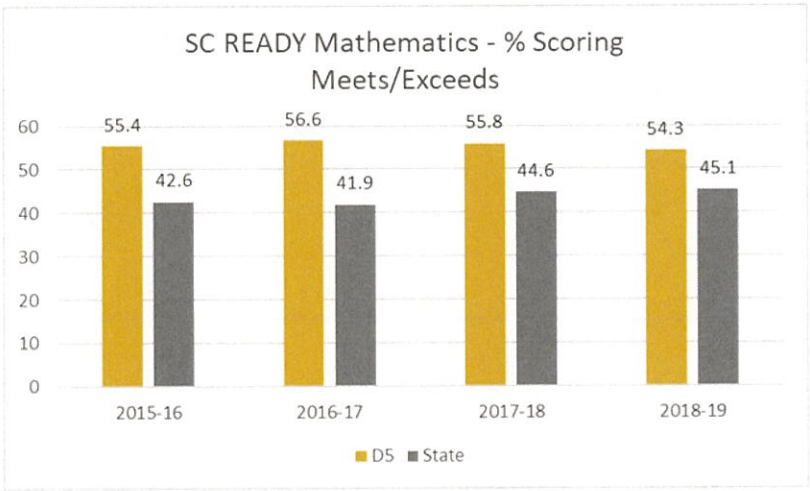




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## Student Achievement

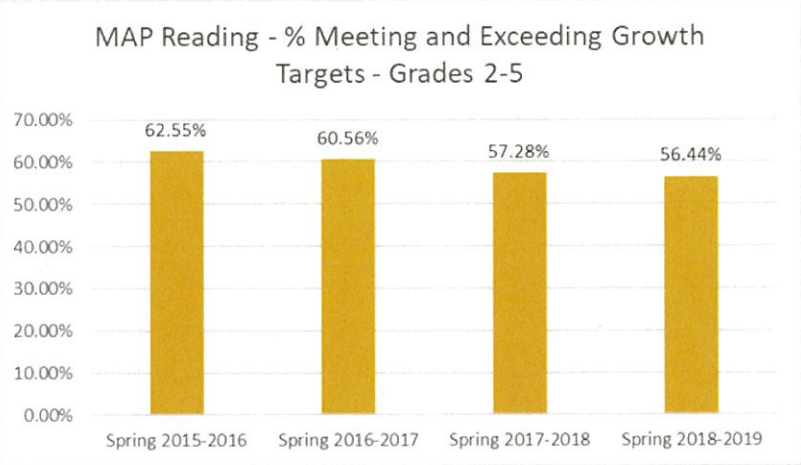


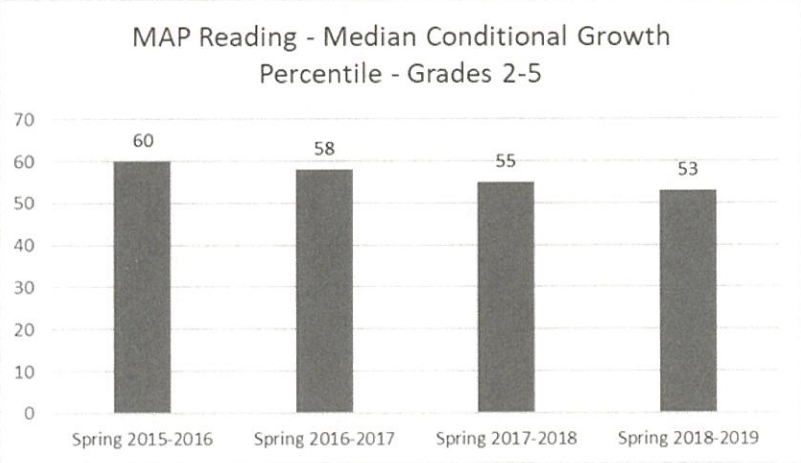

| D5 Ranking Among SC School Districts – SC READY ELA | | | |
|---|---|---|---|
| 2015-16 | 2016-17 | 2017-18 | 2018-19 |
| 3 | 2 | 4 | 5 |

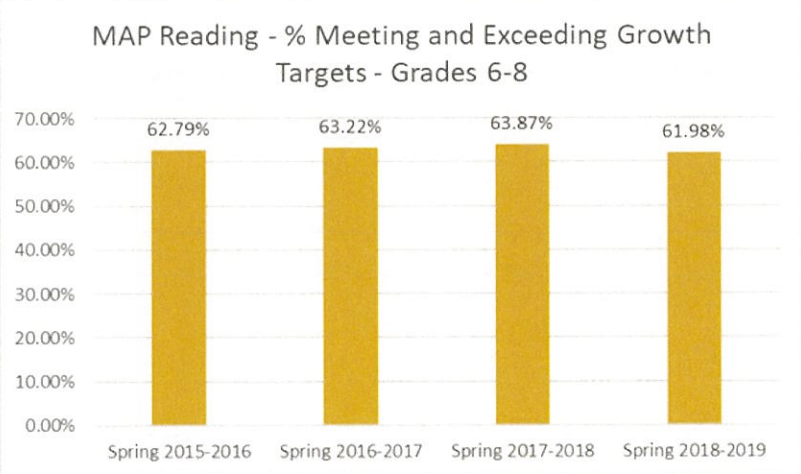



| D5 Ranking Among SC School Districts – SC READY Mathematics | | | |
|---|---|---|---|
| 2015-16 | 2016-17 | 2017-18 | 2018-19 |
| 6 | 6 | 8 | 12 |

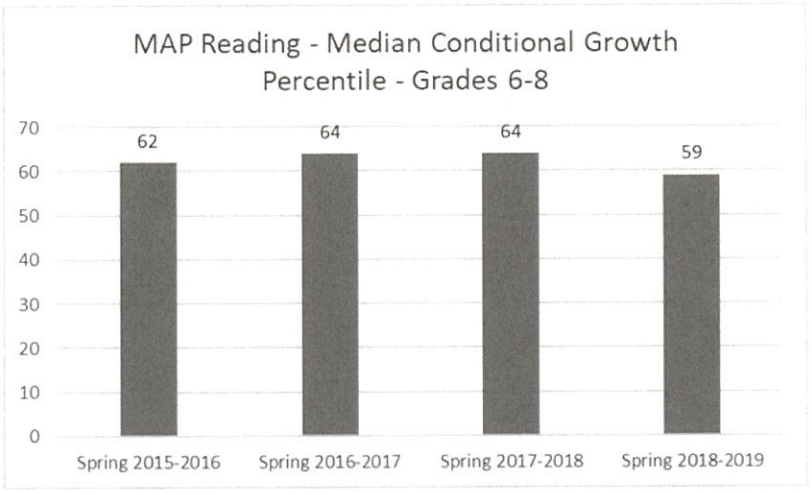
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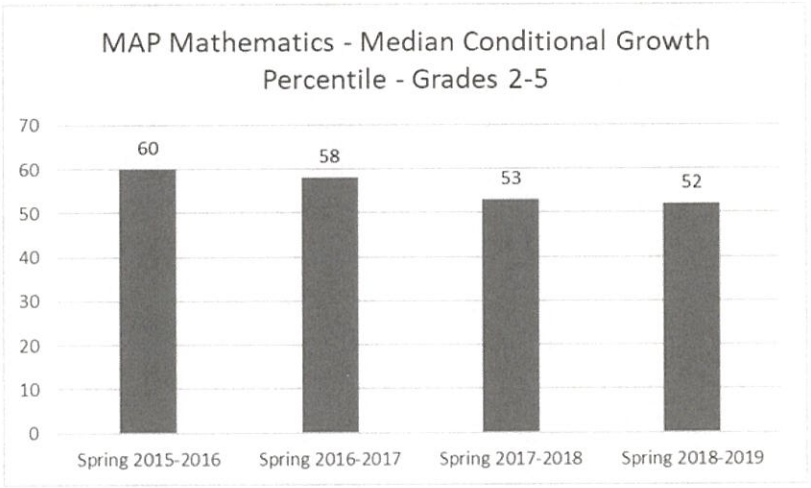


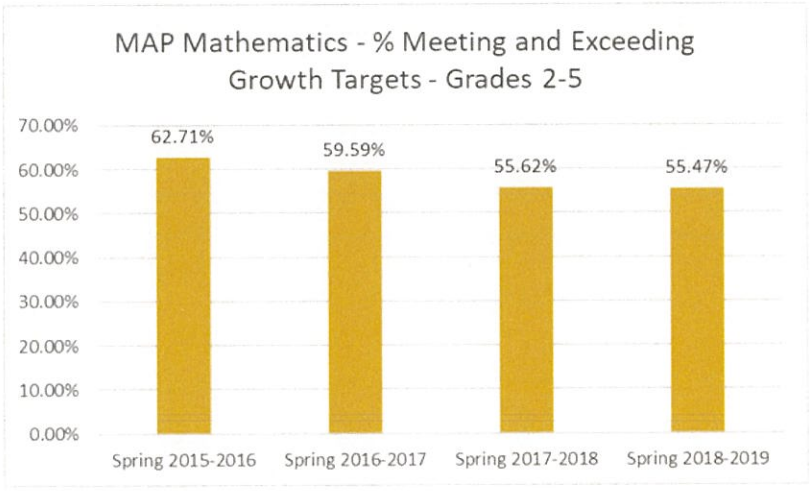



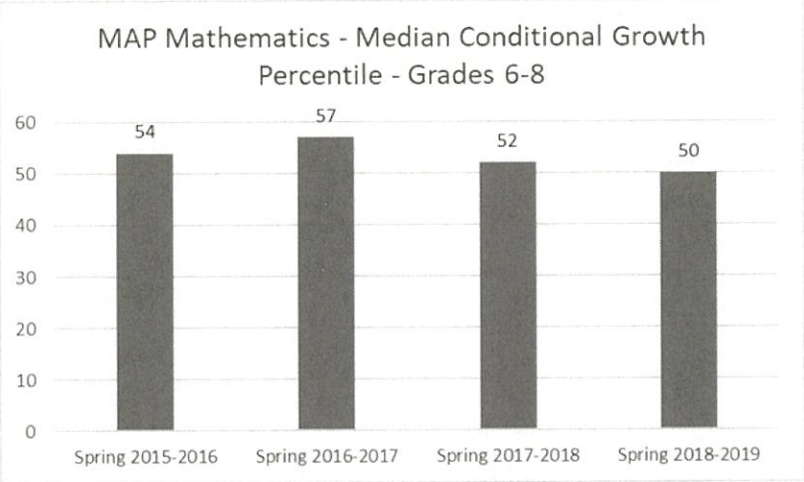

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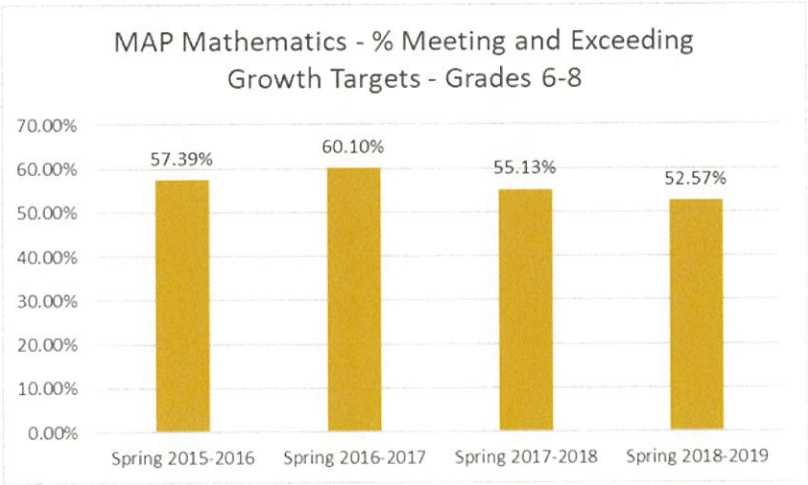


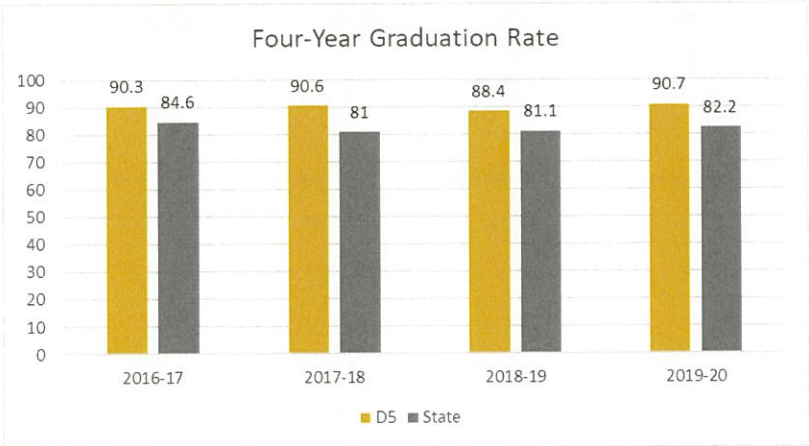




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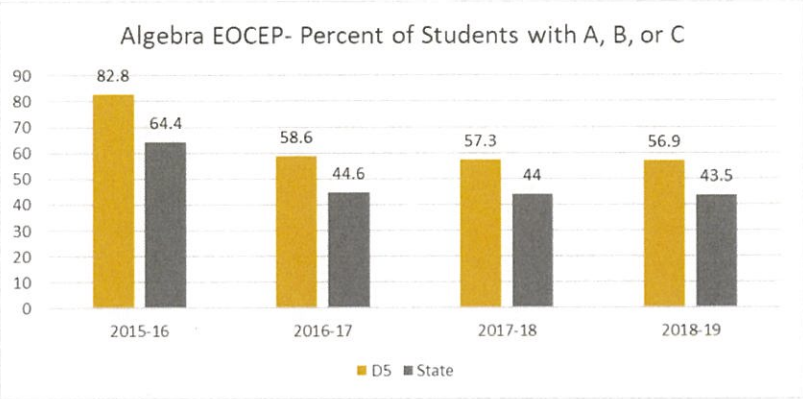


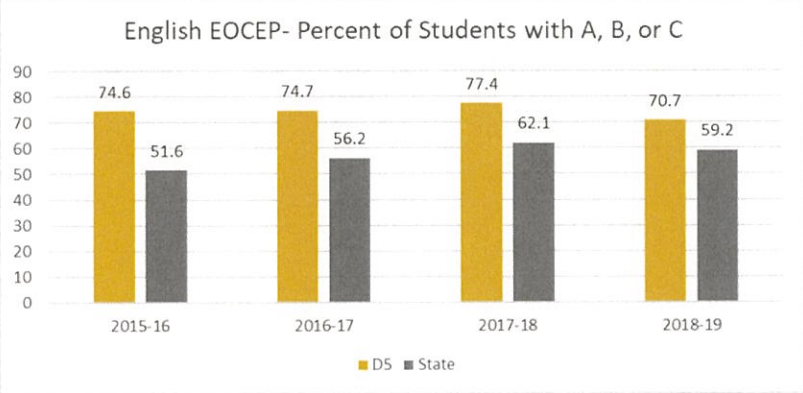




| D5 Ranking Among SC School Districts | | | |
|---|---|---|---|
| 2016-17 | 2017-18 | 2018-19 | 2019-20 |
| 9 | 7 | 15 | 10 |

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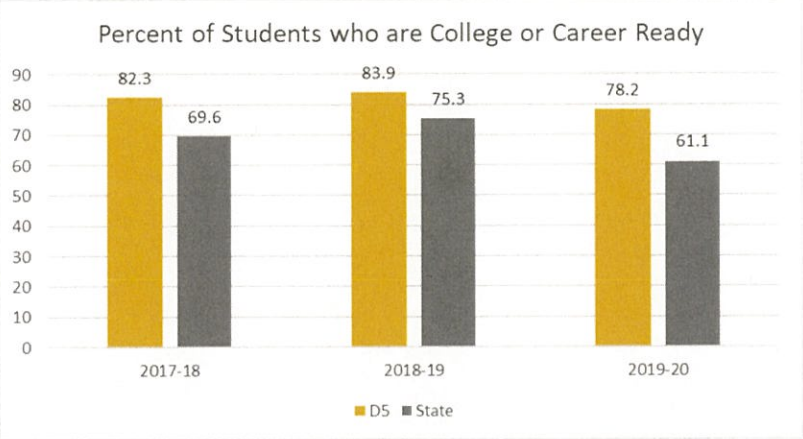



| D5 Ranking Among SC School Districts – Algebra EOCEP | | | |
|---|---|---|---|
| 2015-16 | 2016-17 | 2017-18 | 2018-19 |
| 5 | 7 | 7 | 8 |

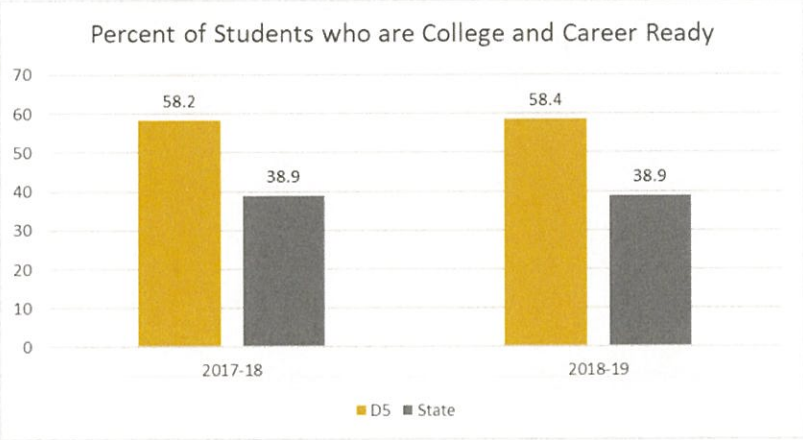



| D5 Ranking Among SC School Districts – English EOCEP | | | |
|---|---|---|---|
| 2015-16 | 2016-17 | 2017-18 | 2018-19 |
| 3 | 2 | 2 | 4 |

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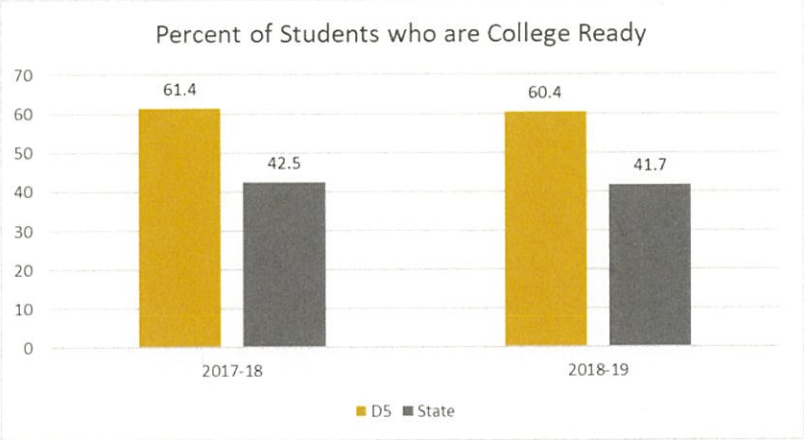



| D5 Ranking Among SC School Districts – College or Career Ready | | |
|---|---|---|
| 2017-18 | 2018-19 | 2019-20 |
| 3 | 13 | 3 |

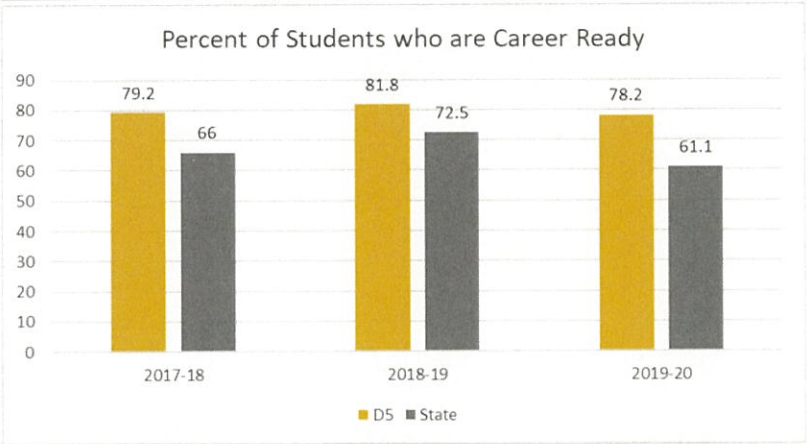



| D5 Ranking Among SC School Districts – College and Career Ready | | |
|---|---|---|
| 2017-18 | 2018-19 | 2019-20 |
| 2 | 2 | n/a |

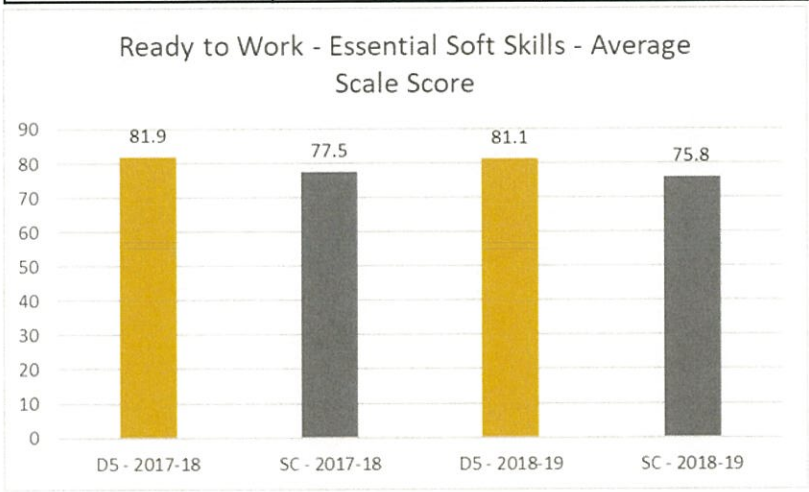
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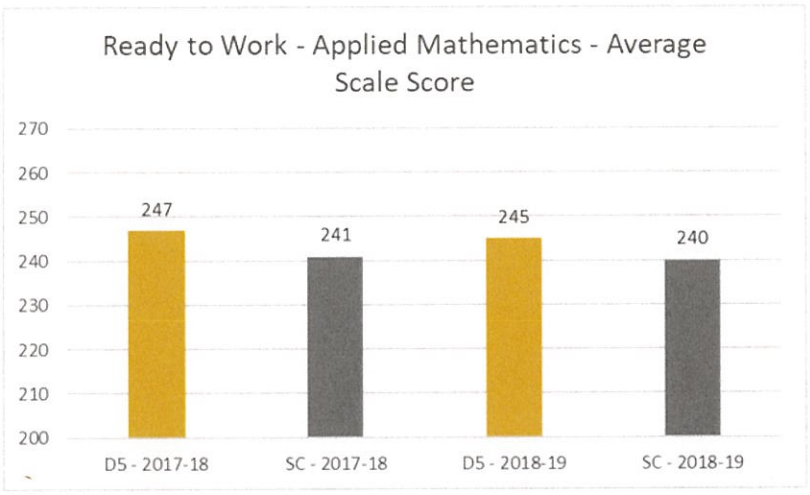

| D5 Ranking Among SC School Districts – College Ready | | |
|---|---|---|
| 2017-18 | 2018-19 | 2019-20 |
| 2 | 3 | n/a |

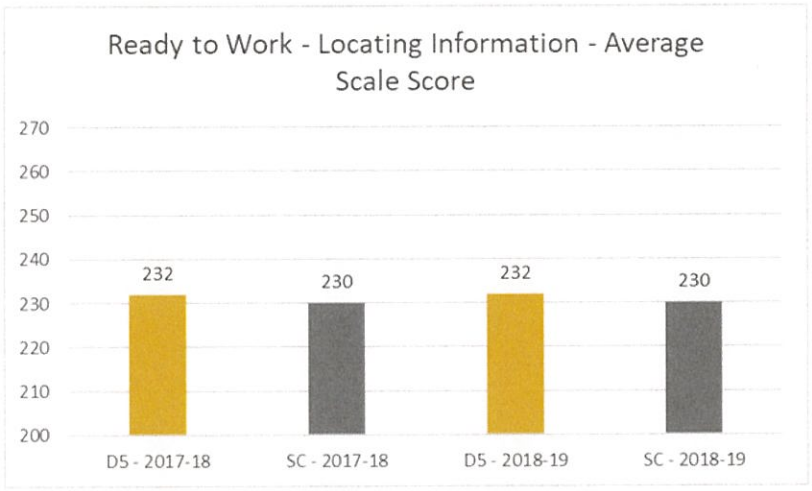


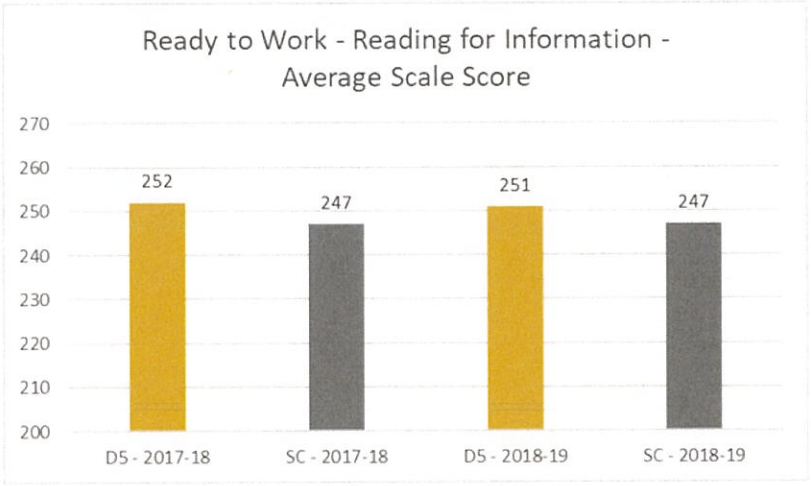

| D5 Ranking Among SC School Districts – Career Ready | | |
|---|---|---|
| 2017-18 | 2018-19 | 2019-20 |
| 3 | 13 | 3 |



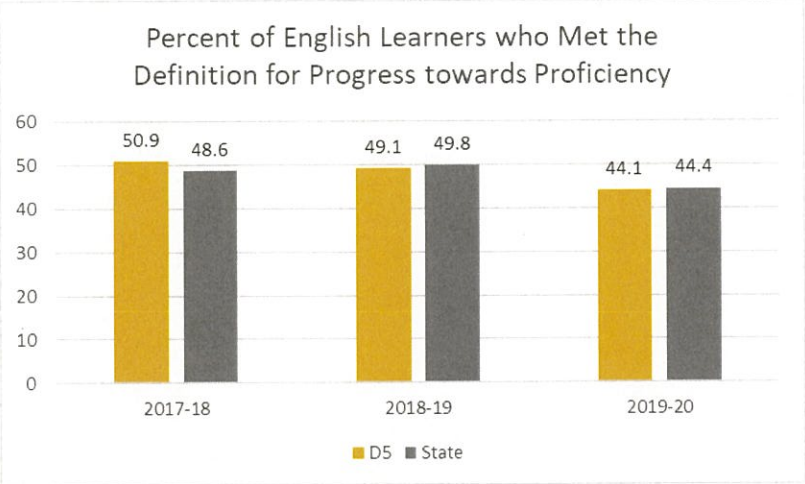

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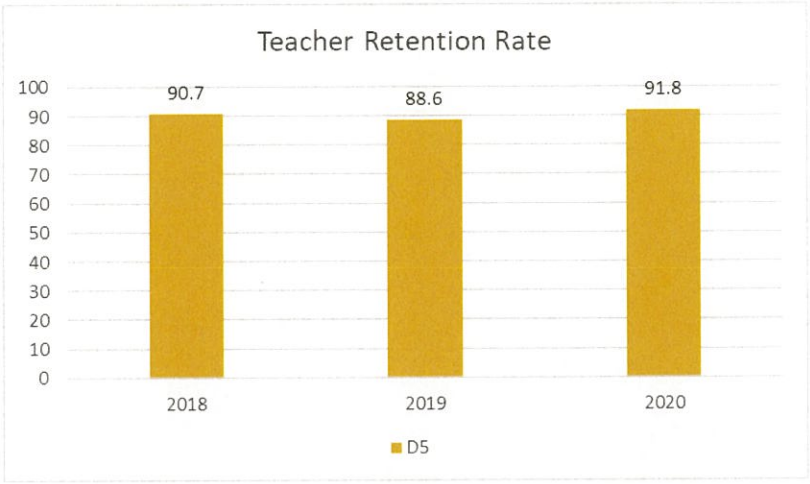

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| D5 Ranking Among SC School Districts – Career Ready | | |
|---|---|---|
| 2017-18 | 2018-19 | 2019-20 |
| 25 | 26 | 34 |

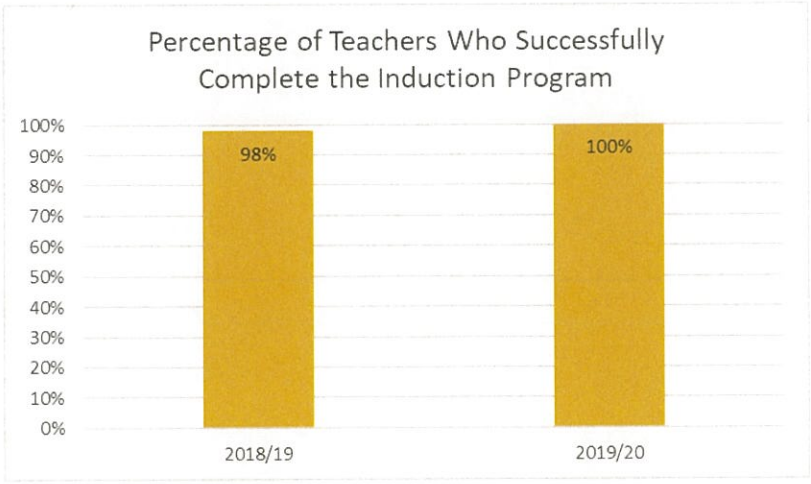
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## Teacher/Administrator Quality

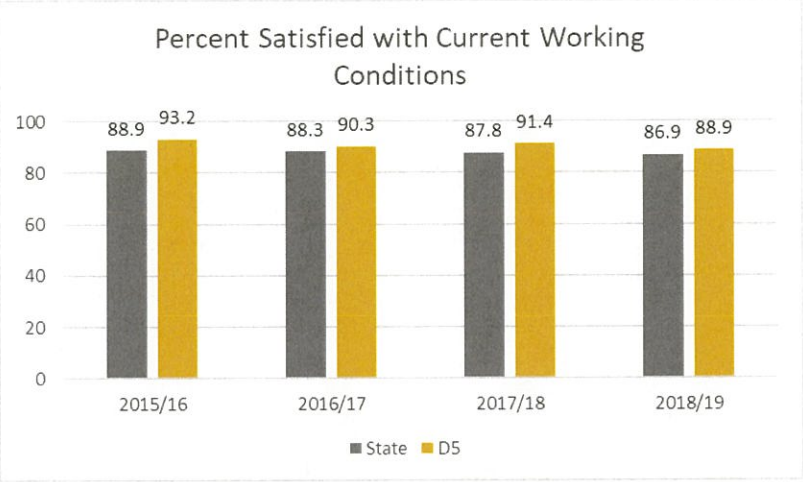


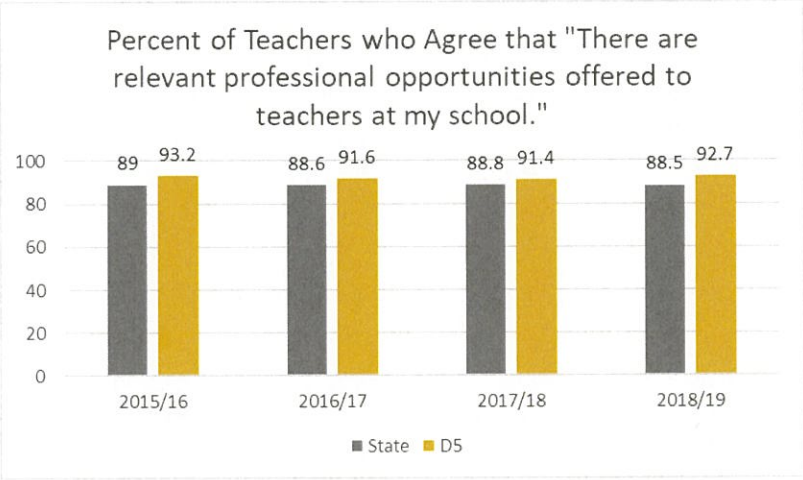

| Retention Rate Ranking Among South Carolina School Districts* | | |
|---|---|---|
| 2018 | 2019 | 2020 |
| 11 | 19 | 14 |

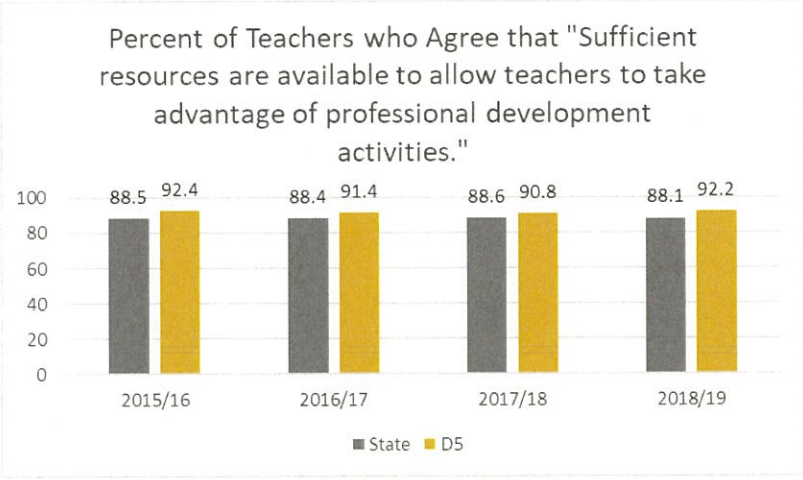
*** Note: Only 1 district in the state employed a greater number of teachers AND had a higher teacher retention rate than District 5.**



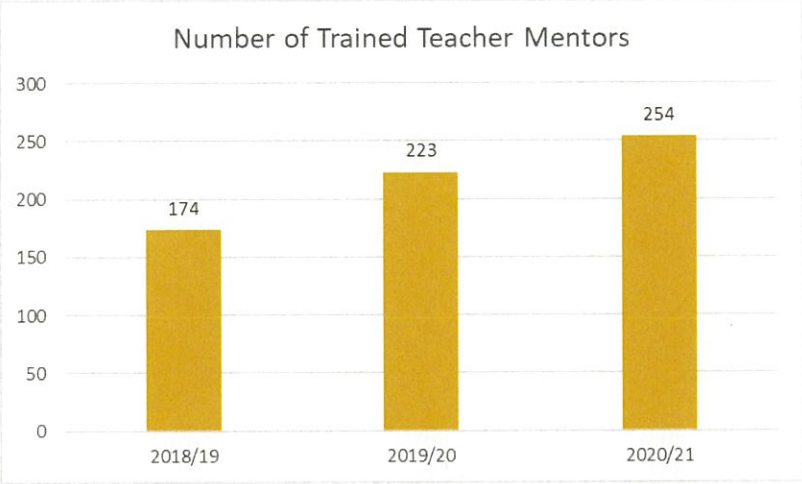

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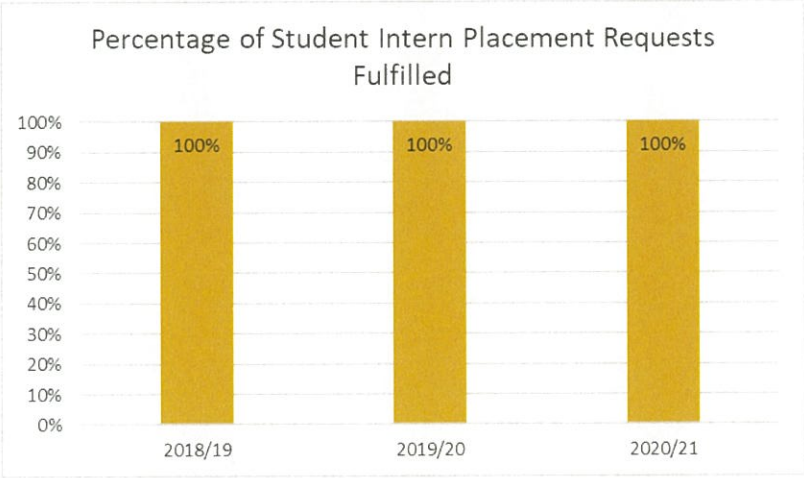


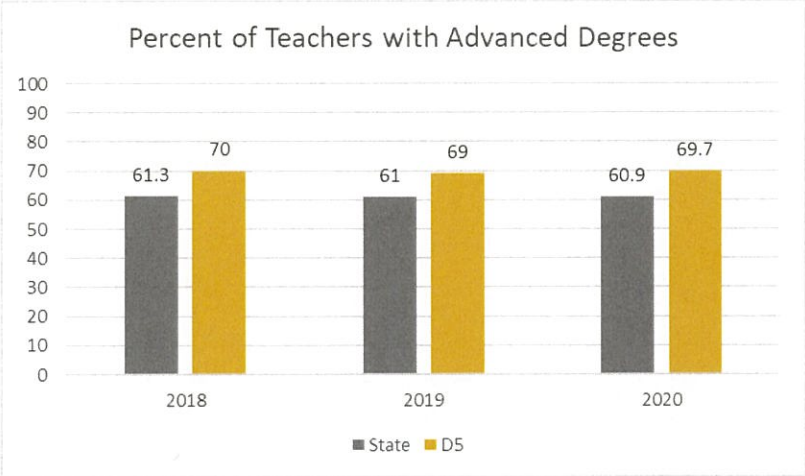




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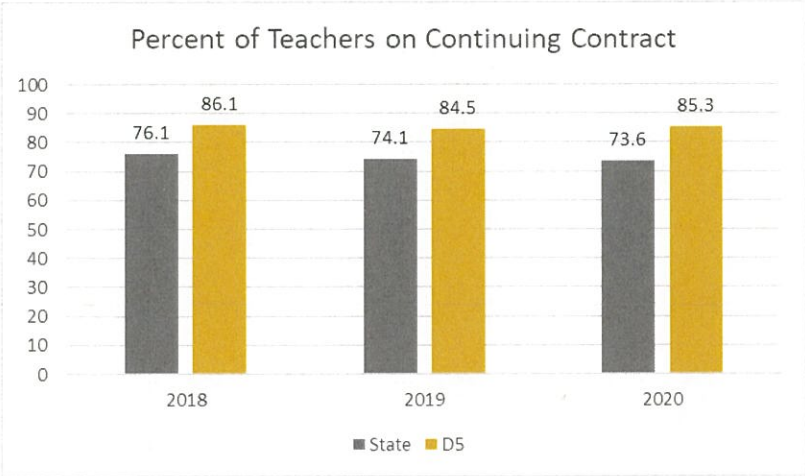



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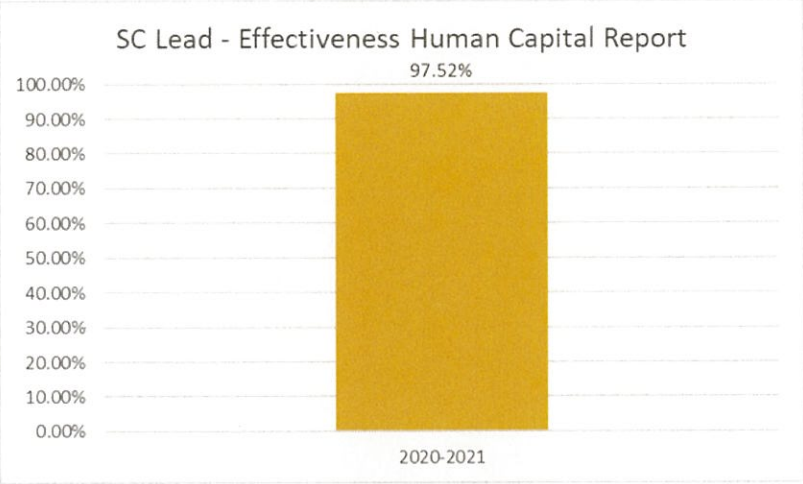


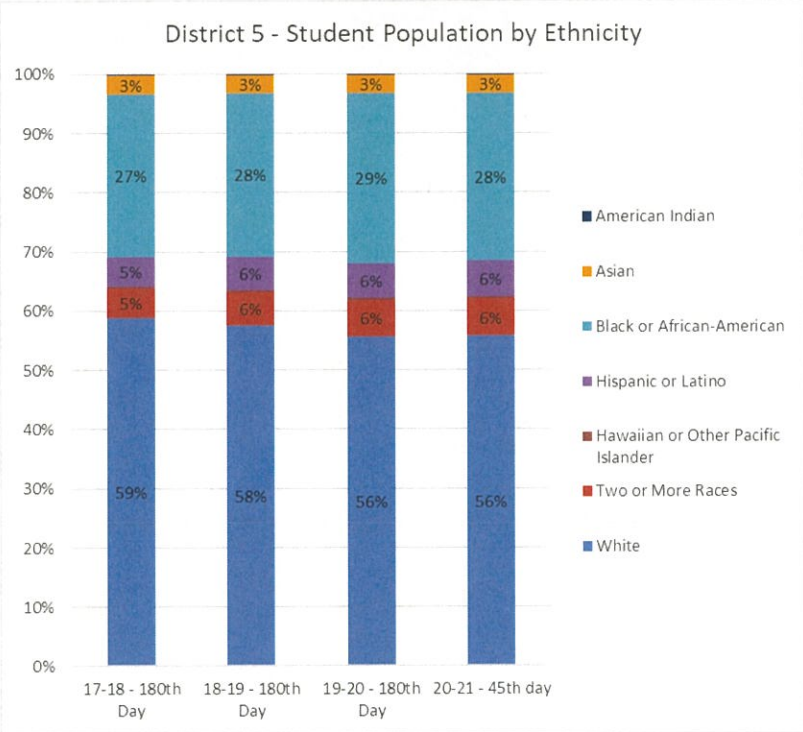

| Percent of Teachers with Advanced Degrees Ranking Among South Carolina School Districts | | |
|---|---|---|
| 2018 | 2019 | 2020 |
| 6 | 7 | 6 |



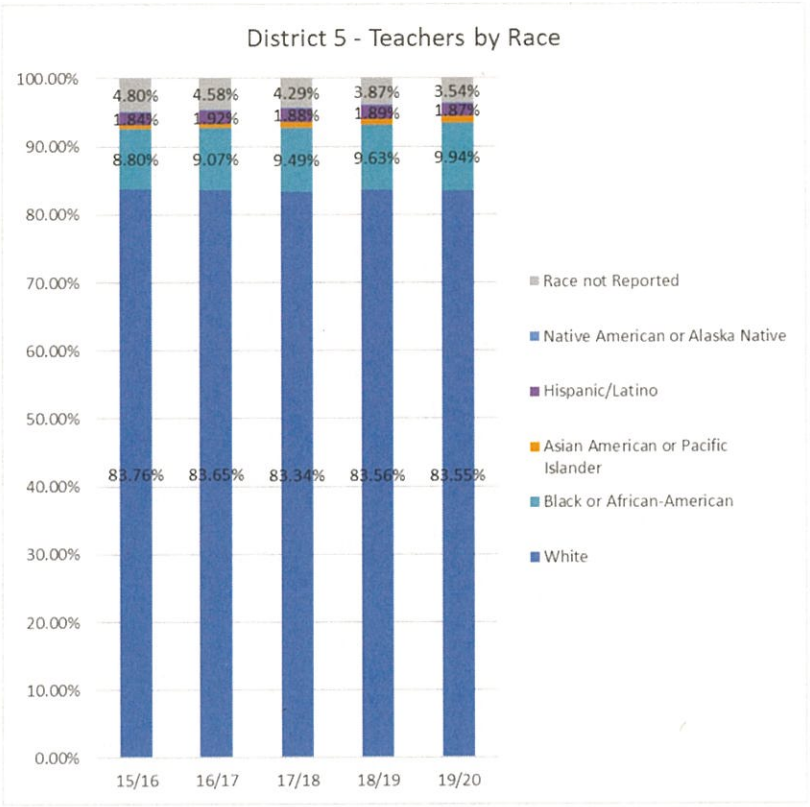

| Percent of Teachers on Continuing Contract Ranking Among South Carolina School Districts | | |
|---|---|---|
| 2018 | 2019 | 2020 |
| 7 | 12 | 12 |

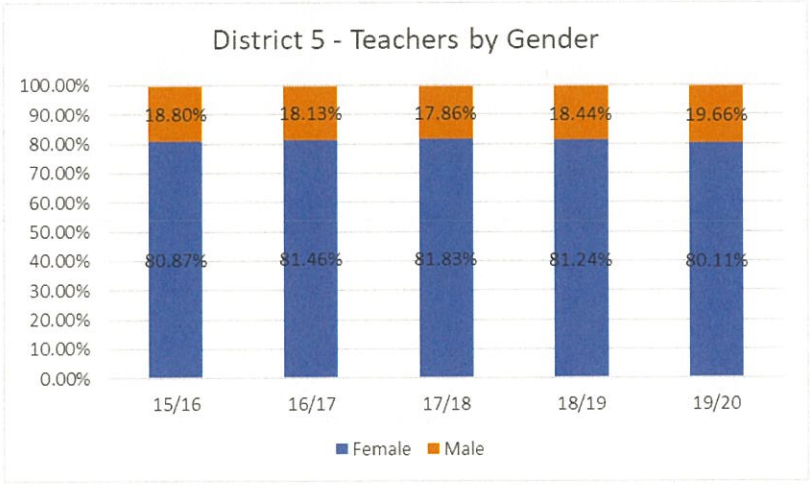
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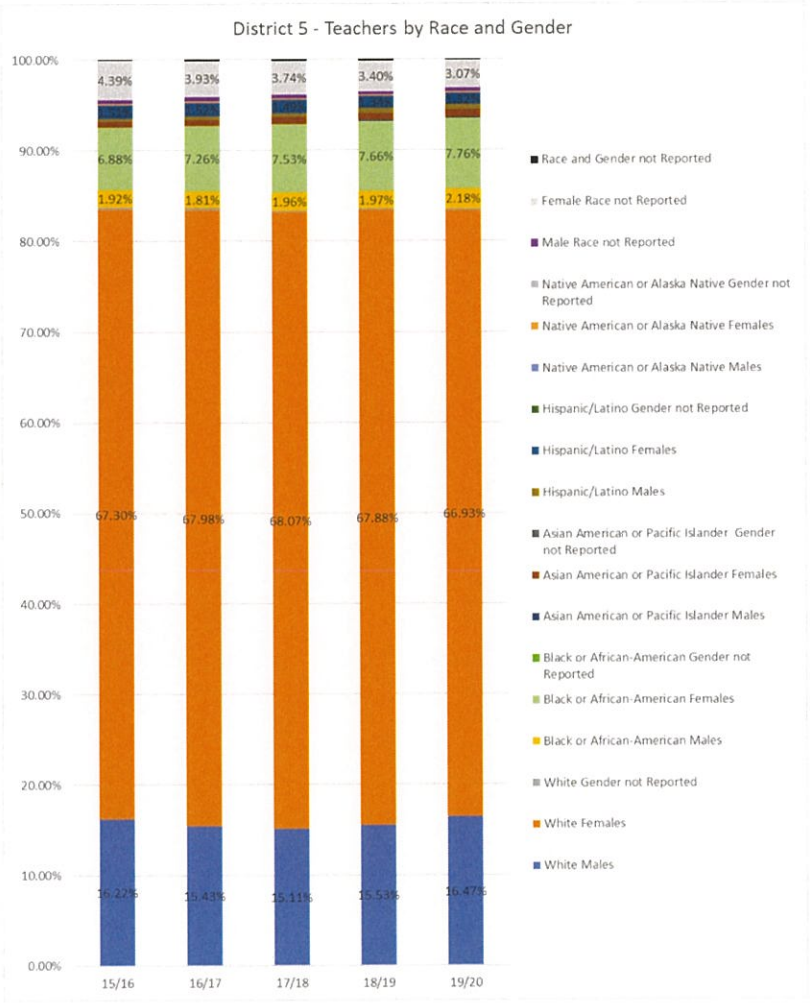




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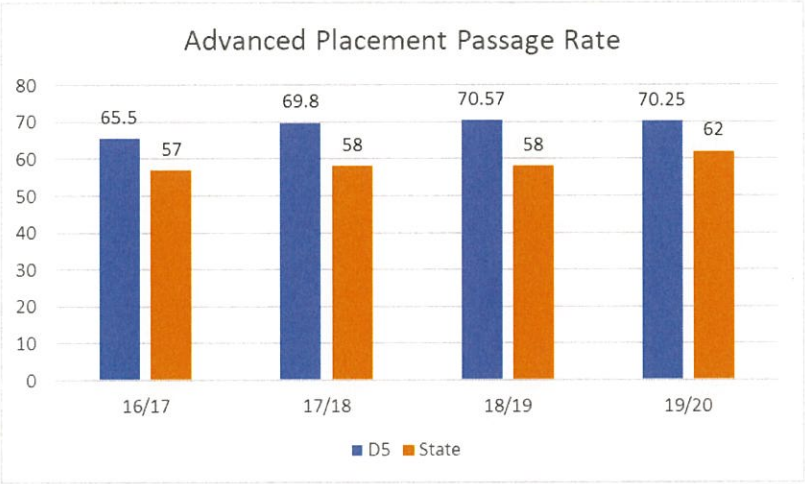




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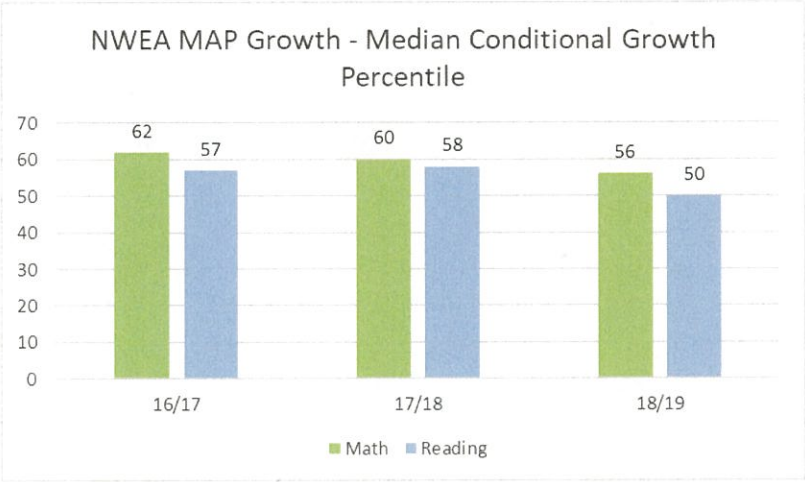



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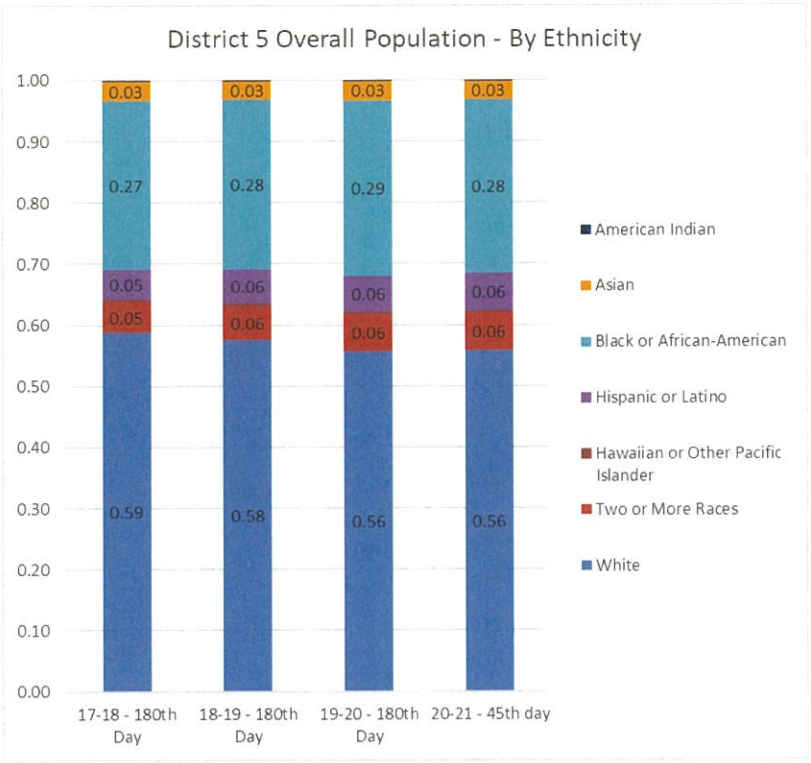
## Gifted and Talented

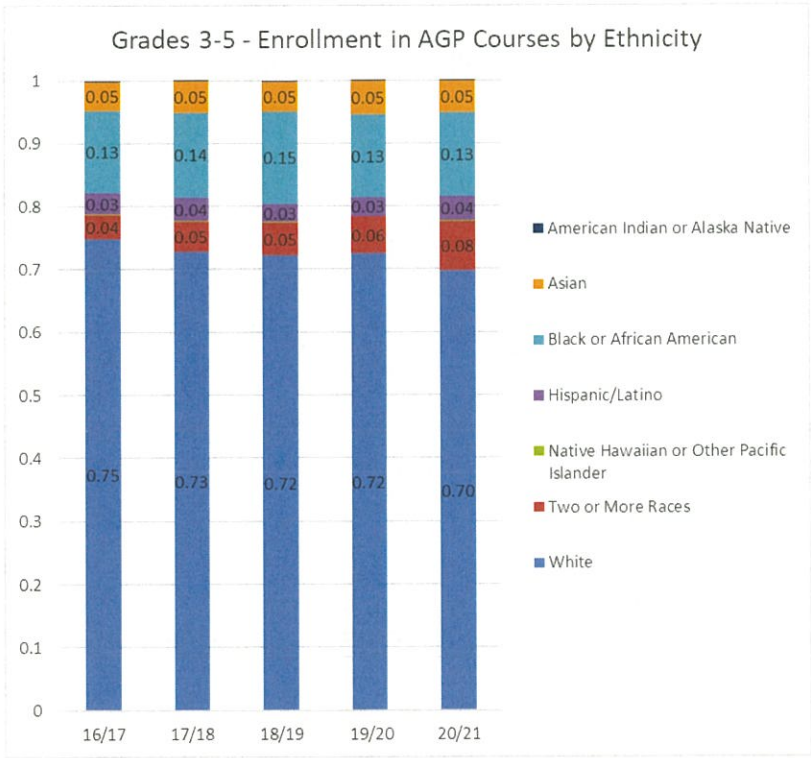



**In this measure, we have isolated students in grades 2-8 who began the year at or above the 90th percentile on MAP Growth Mathematics or Reading.**

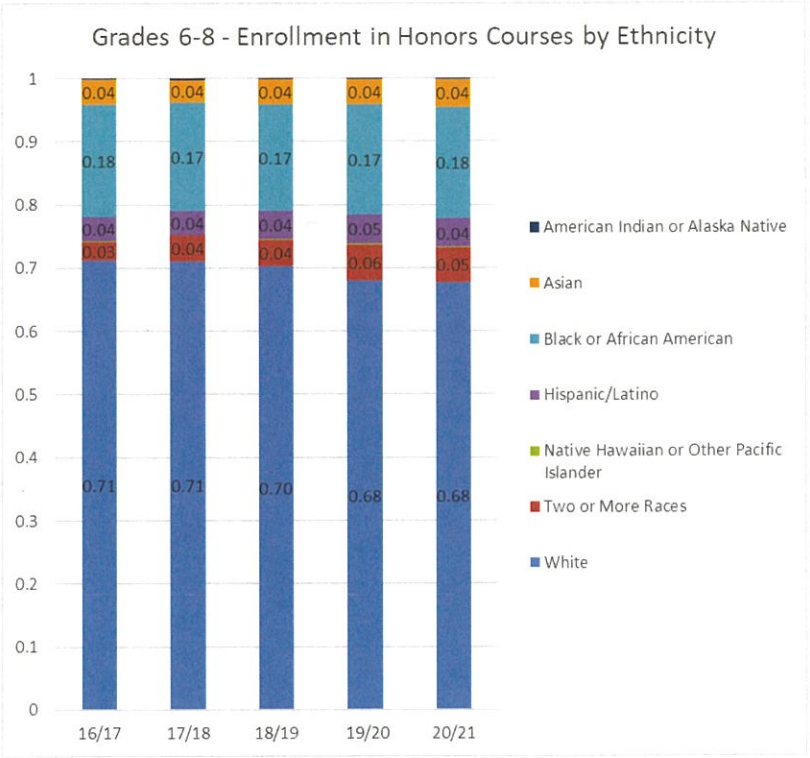


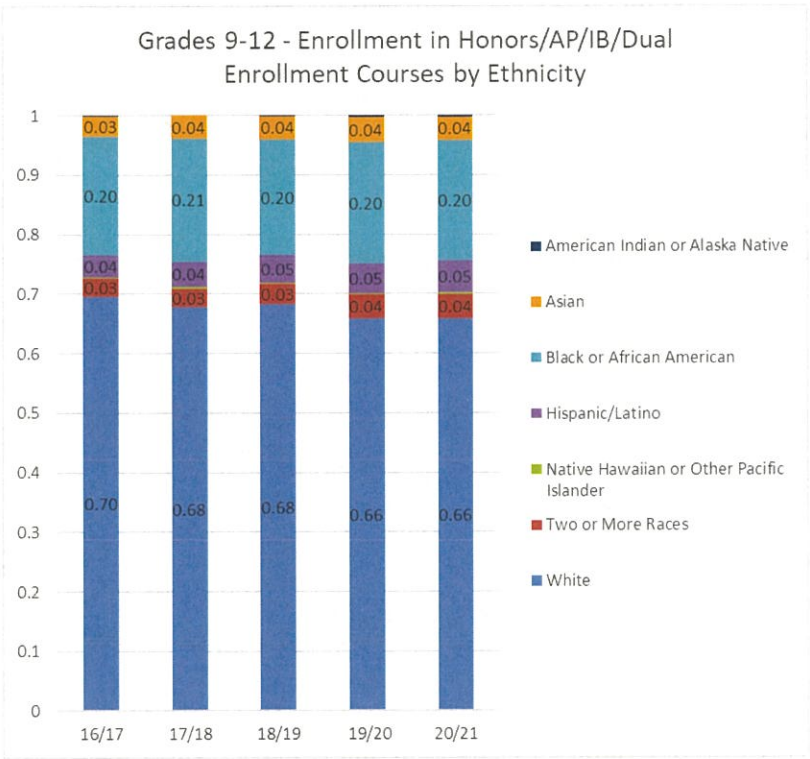

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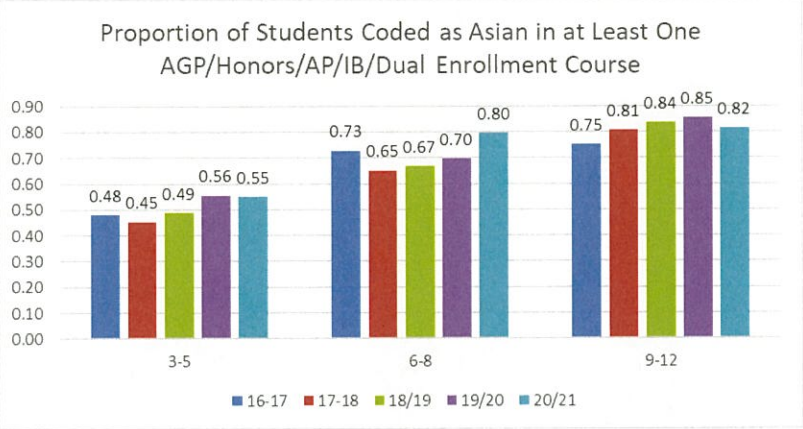



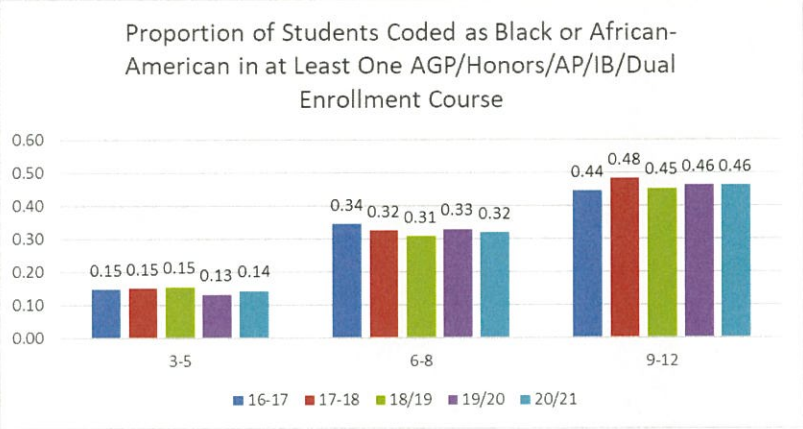

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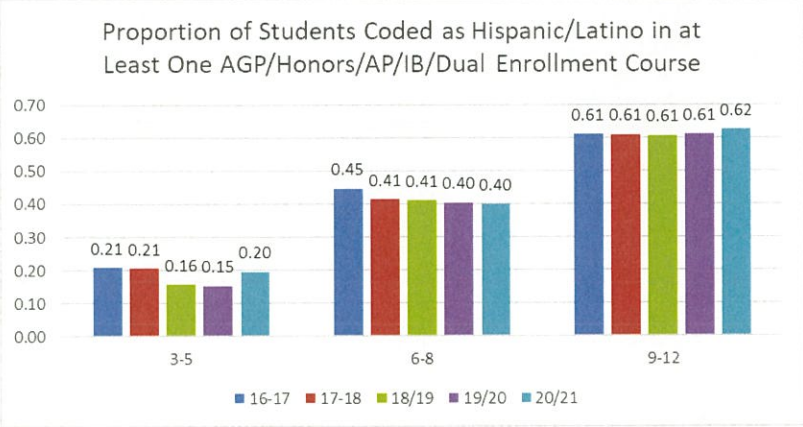


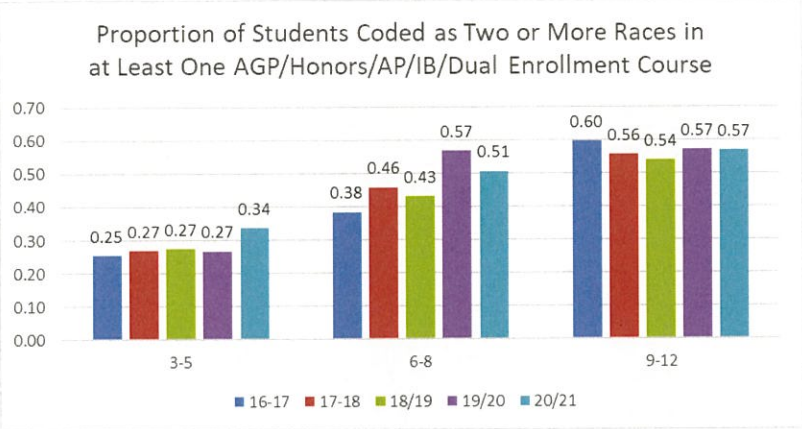

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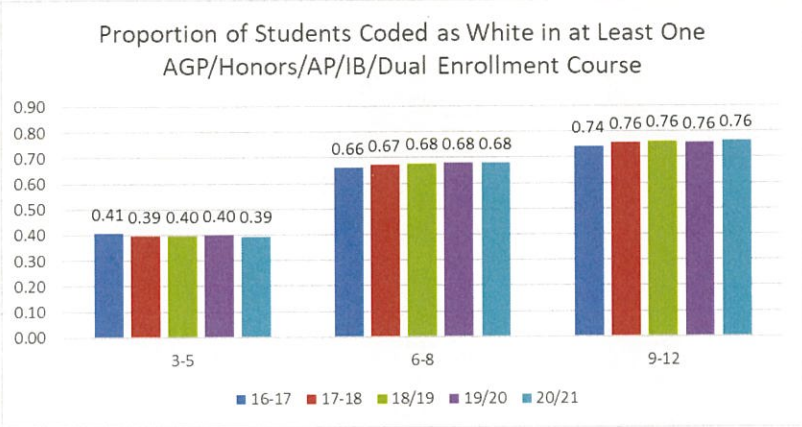


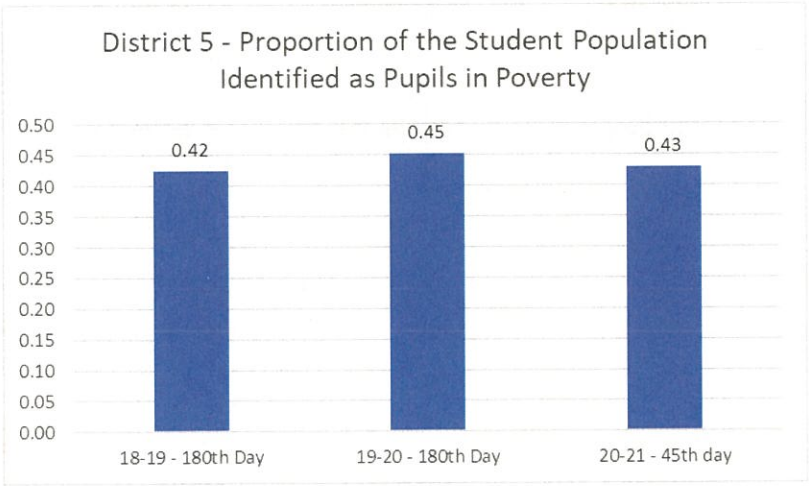



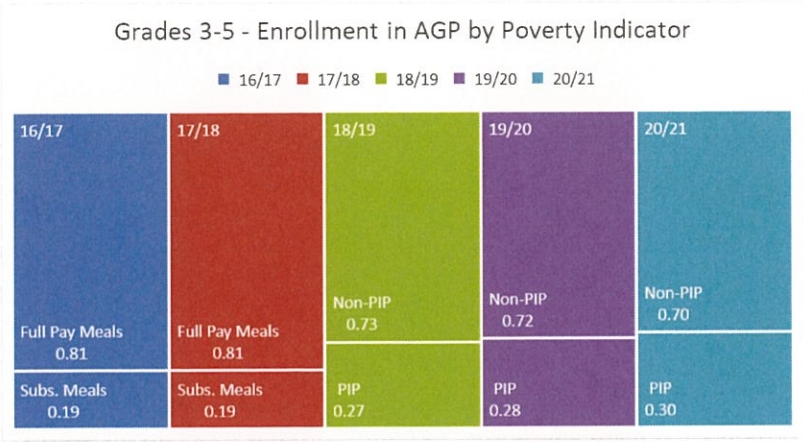

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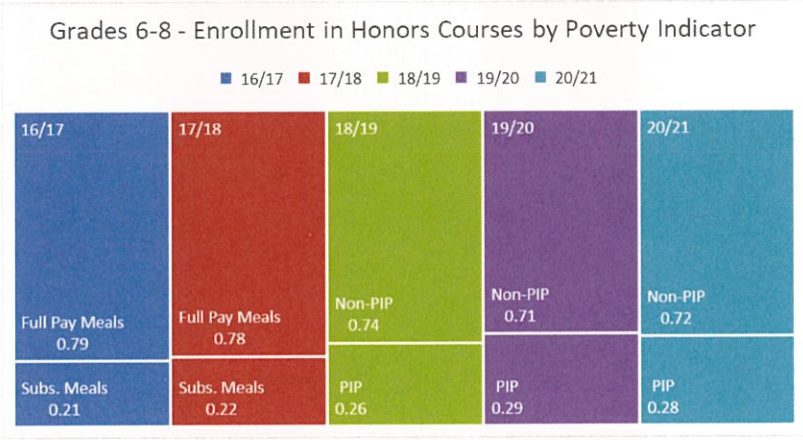


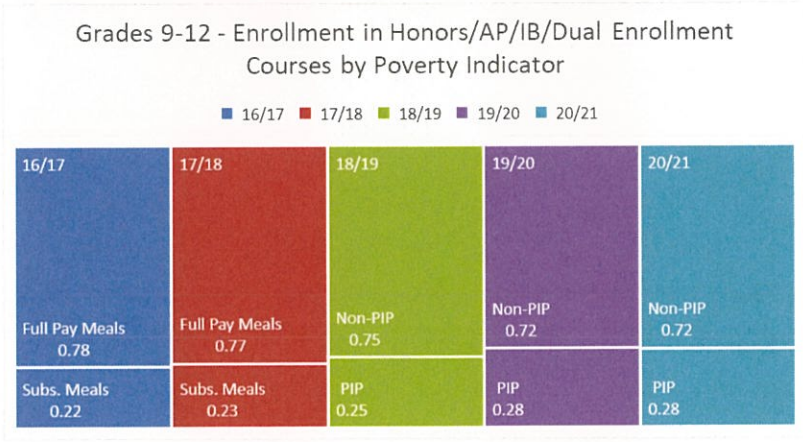



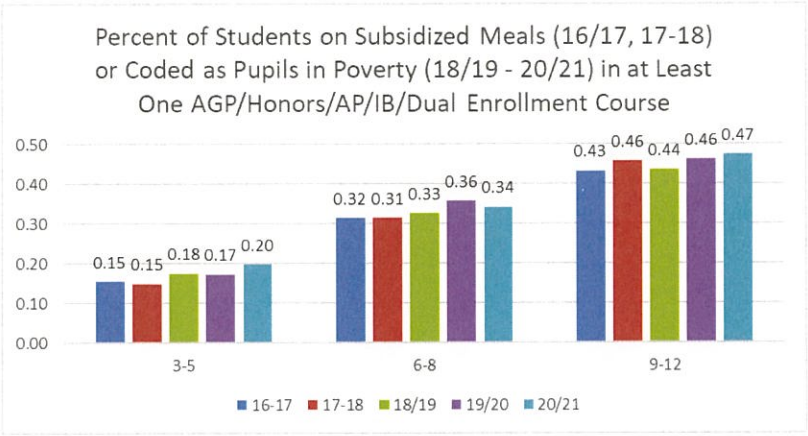

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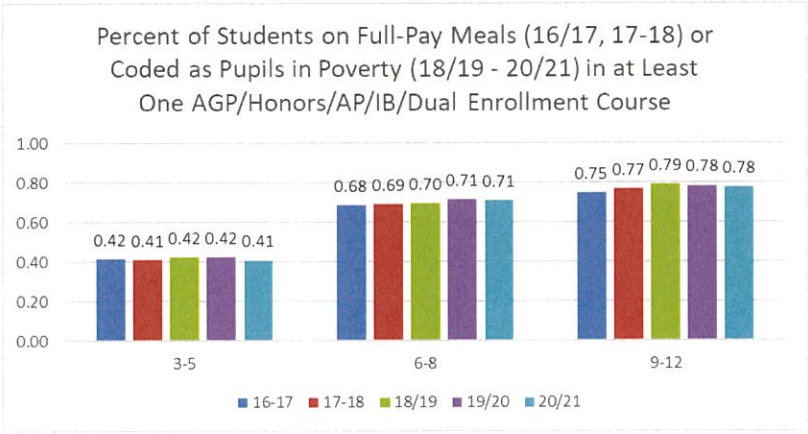


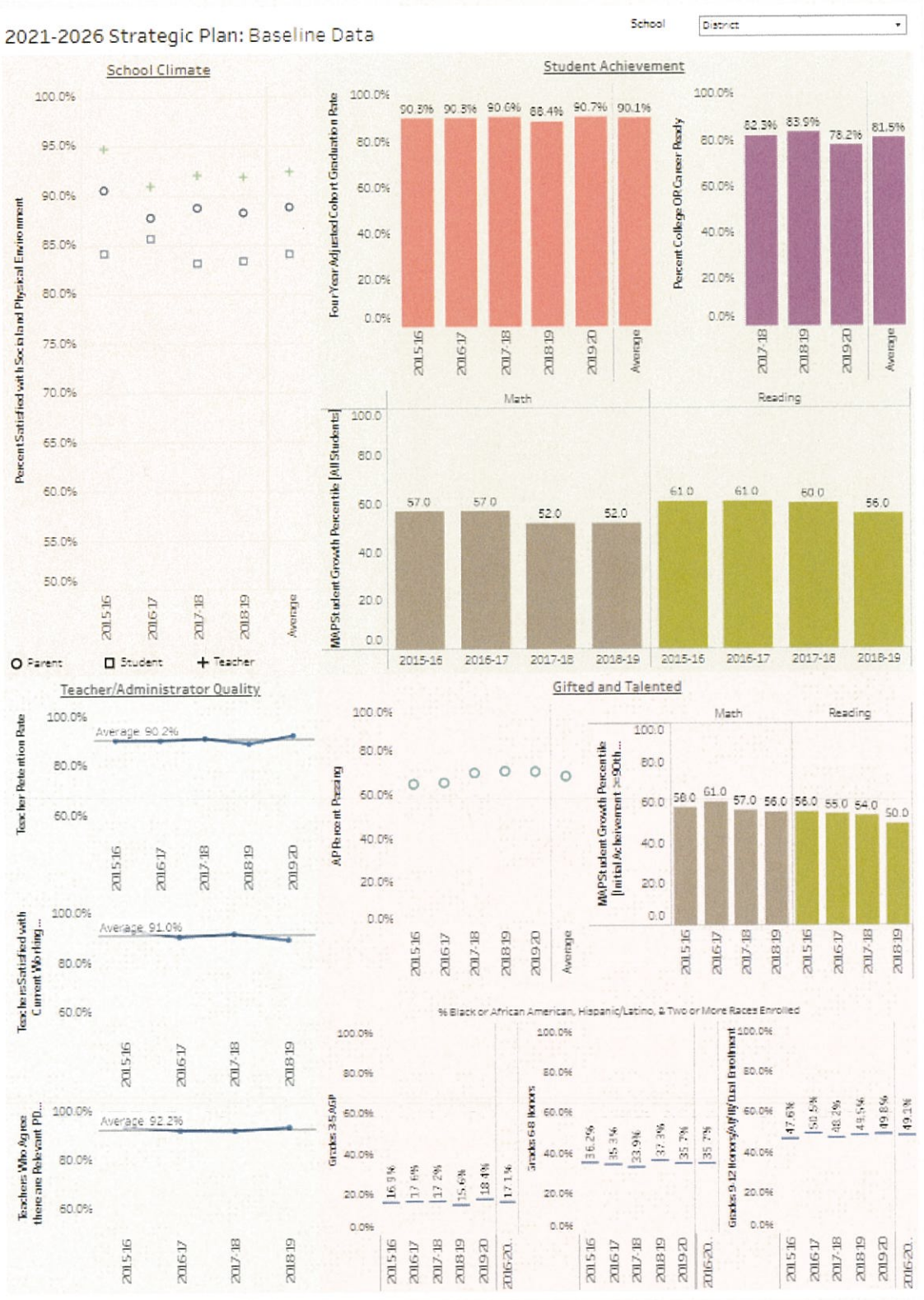

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# Overall




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# EXECUTIVE SUMMARY OF NEEDS ASSESSMENT DATA FINDINGS

Per SBE Regulation 43-261, the annual needs assessment will provide focus for planning teams to set priorities for the plan. The comprehensive needs assessment must identify targeted areas of discrepancy between the desired performance levels and the current status as indicated by available data. Any discrepancies in the following areas identified by the school and district report cards must be included in the plan: (1) achievement, (2) achievement by subgroups, (3) graduation rates, (4) attendance, (5) discipline, (6) teacher/administrator quality and professional growth, and (7) other priority areas.

Measurable performance goals, written in five-year increments, shall be developed to address the major areas of discrepancy found in the needs assessment in key areas reported in the district and school report cards.

State Report Card for districts and schools data

**Directions:** In the appropriate boxes, use school data to identify areas in need of improvement. Required areas to be addressed: Student Achievement, Teacher/Administrator Quality, and School Climate.

| ***Student Achievement, including sub-groups*** |
|---|
| ***Early Childhood/Primary (PK–2)*** |
| District 5 continuously monitors achievement and growth data for students in kindergarten, first grade, and second grade. This includes the administration of the Kindergarten Readiness Assessment, FastBridge, and MAP Growth.<br>During the 2017-18, 2018-19, 2019-20, and 2020-21 school years, between 35% and 41.2% of our kindergarten students entered kindergarten demonstrating readiness to learn on the Kindergarten Readiness Assessment.<br>In 2019, the district transitioned to FastBridge as a progress-monitoring tool for reading. This is administered three times per year to students in kindergarten and first grade. Between 27.67% and 36% of kindergarten and first grade students were identified as high-risk on the Spring 2019, 2021, and 2022 administrations of FastBridge.<br>We also consider growth data. Students in first and second grade now participate in MAP Growth testing in both mathematics and reading in the Fall, Winter, and Spring. The Fall to Spring Median Conditional Growth Percentiles in reading ranged from 47 to 58. The Fall to Spring Median Conditional Growth Percentiles in mathematics ranged from 50 to 65.<br>We must continue to focus on providing the highest quality instruction to our students in Kindergarten through second grade. |
| ***Elementary/Middle (3–8)*** |
| District 5's student achievement data consistently exceeds the state data. The percentage of students scoring Meets or Exceeds Expectations on SC READY ranged from 54.2 to 57.9. |

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The percentage of students scoring Meets or Exceeds Expectations on SC READY English Language Arts ranged from 54.2 to 57.9. District 5 ranked in the top five of all districts in the state on this measure between 2015-16 and 2018-19. The percentage of students scoring Meets or Exceeds Expectations on SC READY Mathematics ranged from 54.3 to 56.6. District 5 ranked in the top ten of all districts in the state on this measure between 2015-16 and 2017-18. However, the committee also noted a decrease in the percentage of District 5 students scoring Meets or Exceeds Expectations between 2016-17 and 2018-19.
The Needs Assessment committee has identified student growth measures as the most appropriate goal for our elementary, intermediate, and middle schools. NWEA MAP Growth Median Conditional Growth Percentiles (MCGP) were selected as the most appropriate metric in Reading and Mathematics as the MCGP quantifies how much students grew compared to the historical trends of similar scoring students.
The committee recommended that the district put strategies in place to address the growth and achievement of students with disabilities and multilingual learners.

***High School (9–12)***

The percentage of students earning a C or above on Algebra 1 EOCEP ranged from 56.9 to 58.6 between 2016-17 and 2018-19. District 5 ranked in the top ten of all districts in the state on this measure in all three years. The percentage of students earning a C or above on English 1 EOCEP ranged from 70.7 to 77.4 between 2015-16 and 2018-19. District 5 ranked in the top five of all districts in the state on this measure in all four years.
The four-year graduation rate ranged from 88.4 to 90.7 from 2016-17 to 2019-20. District 5 was ranked in the top ten of all districts in the state in three of those years. The percentage of students who are college or career ready ranged between 78.2 and 82.3 between 2017-18 and 2019-20. District 5 ranked third in the state on this measure in two of the three years.
The Needs Assessment committee identified graduation rate and College or Career Readiness as the goals for high schools. These goals ensure that schools are focused on students' successful completion of PK-12 programs and are prepared for life after PK-12 education.
The committee recommended that the district put strategies in place to address the growth and achievement of students with disabilities and multilingual learners.

***Teacher/Administrator Quality***

The Needs Assessment committee reviewed data from three general areas: teacher retention; teacher development; and teacher characteristics. Every data point suggested that District 5 excels in these areas.
Between 2018 and 2020, the district's teacher retention rate ranged from 88.6 to 91.8. This was among the highest of all districts in the state and consistently one of the best retention rates of districts with a similar number of teachers. Districts with higher retention rates typically had a smaller number of teachers in the district.
The retention rate was likely influenced by teacher satisfaction with working conditions. Between 2015-16 and 2018-19, 88.9 to 93.2 percent of District 5 teachers stated that they were satisfied with working conditions when completing the annual South Carolina Department of Education survey. The state satisfaction ranged from 86.9 to 88.9.
District 5's LeaD5 professional development program has offered teachers' choices in professional development. Between 2015-16 and 2018-19, 91.4 to 92.7 percent of District 5 teachers stated that there were relevant professional development opportunities offered to

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teachers at their schools. The state satisfaction rate ranged from 88.5 to 89 percent. Over the same time period, 90.9 to 92.4 percent of teachers agreed that sufficient resources were available for teachers to take advantage of professional development activities. The state satisfaction rate ranged from 88.1 to 88.6.
The district has also increased the number of teacher mentors and consistently filled all placement requests for student teachers. Committees also noted teacher satisfaction with technology and other courses that were offered without cost or with minimal cost.
Between 2018 and 2019, 69.7 to 70 percent of the district's teachers possessed advanced degrees. The state percentage ranged from 60.9 to 61.3. The percentage of District 5 teachers on continuing contracts ranged from 84.5 to 86.1 while the state percentage ranged from 73.6 to 76.1.
The committee noted that the racial and gender characteristics of the district's teachers is not representative of the student body. White students typically made up between 56 and 59 percent of the student body between 2017-18 and 2020-21. Between 2015-16 and 2019-20, White teachers accounted for between 83.34 and 83.76 percent of the district's teachers. Over the same time period, male teachers made up between 17.86 and 19.66 percent of the district's teachers.
The Needs Assessment identified teacher retention and teacher development as key goal areas for the district. The measures selected were teacher retention rate, teacher satisfaction with working conditions, and teacher perceptions of professional development.
The committee recommended that the district focus on retention by seeking out and utilizing strategies to help teachers find work/life balance, address teacher development by continuing to offer professional development choices for teachers, and correct the lack of racial and gender diversity in the district's faculty by developing and implementing strategies to recruit and sustain teachers from minoritized populations.

***School Climate***

Results from the South Carolina Department of Education Survey were reviewed to better understand parent, student, and teacher perceptions of educational experiences. This analysis showed that parent, student, and teacher satisfaction with the learning environment, social and physical environment, and school-home relations was greater for District 5 than for the state between 2016 and 2019.

Parent satisfaction with the learning environment ranged from 90.6% to 92.1%. Student satisfaction with the learning environment ranged from 81.6% to 84.4%. Teacher satisfaction with the learning environment ranged from 89.7% to 93.9%.

Parent satisfaction with the social and physical environment ranged from 87.7% to 90.5%. Student satisfaction with the social and physical environment ranged from 83.1% to 85.6%. Teacher satisfaction with the social and physical environment ranged from 90.9% to 94.7%.

Parent satisfaction with school-home relations ranged from 76.4% to 78.6%. Student satisfaction with school-home relations ranged from 85% to 86.8%. Teacher satisfaction with school-home relations ranged from 89% to 93.2%.

When the 2018 and 2019 data for each district was reviewed, the committee leaders noted that most of the districts that tended to outperform our district on this measure had fewer

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responses from parents, students, and teachers.

The committee also noted that published survey data showed that District 5 parents and teachers were more satisfied with school safety than parents and teachers around the state. In 2018, District 5 parents were less satisfied with bullying programs than parents statewide. In 2019, parent satisfaction in this area increased by almost eight points and exceeded the state satisfaction level.

The committee noted the need to focus on parent, student, and teacher perceptions of social and physical environment. This goal will allow the district to focus on issues that emerged from the data and perceptions of needs in the district.

The committee recommended that the district put strategies in place to support the social and physical environment goal. These strategies should address the following areas as they reflected underlying areas of need in the survey data: family engagement; social and emotional learning; Positive Behavioral Interventions and Supports; bullying; and school safety. The family engagement strategy was seen by the committee as being of high importance as this could address both the social and physical environment priority as well as parent perceptions of school-home relations.

***Gifted and Talented (District Only)***

The Gifted and Talented Committee reviewed data on the outcomes and opportunities associated with the district's gifted and talented programs. Between 2016 and 2020, the percentage of District 5 students served by gifted and talented programs ranged from 27.9 to 35 annually. District 5 ranked between the fourth highest and highest among all districts in the state during this time period.

High achieving students typically performed well on achievement and growth measures. Between 2017 and 2019, students who began the year at or above the 90th percentile typically grew at levels that exceeded the performance of similar scoring students nationally on the NWEA MAP Growth assessment. This was measured by the Median Conditional Growth Percentile.

At the high school level, a high number of students participate in Advanced Placement programs. Between 1,660 and 1,854 students annually participated in Advanced Placement exams between 2016 and 2020. These students took between 3,220 and 3,466 exams annually. Students received a passing score on 68.2% of the 16,609 total exams administered during that time period. The annual passage rate ranged from 64.9% to 70.57% between 2016 and 2020. During the same time period, the statewide Advanced Placement passage rate ranged from 57% to 62%.

The committee noted disparities between the overall population of the district and the population in the district's gifted programs. For example, between 2017-18 and 2020-21, the percentage of District 5 students coded as Black or African-American, Hispanic or Latino, or Two or More Races ranged from 37% to 41%. However, this was not representative of the populations of students served in programs for gifted students. This was most pronounced in grades 3-5. Between 2017-18 and 2020-21, 22% to 25% of students served in gifted programs in grades 3-5 were coded as Black or African-American, Hispanic or Latino, or Two or More Races. In grades 6-8, the percentage was between 25% and 28%. In grades 9-12, the percentage was between 28% and 29%.

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The committee recommended that the district set goals to continue its high growth and achievement levels for students in gifted programs and to address the disparity between the district's overall student demographics and the demographics of the students in the gifted programs.

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# PERFORMANCE GOAL AREA (1): *School Climate*

**PERFORMANCE GOAL:**
*Per SBE Regulation 43-261, measurable performance goals, written in five-year increments, shall be developed to address the major areas of discrepancy found in the needs assessment in key areas reported in the district and school report cards.*

SMART goal must include:
WHO will do WHAT, as measured by HOW and WHEN.

We will maintain a safe and secure environment focused on the social and emotional growth and development of all students as measured by:

- the **percentage of parents, students, and teachers satisfied with the social and physical environment** on the annual State Department of Education Report Card Opinion Survey increasing from 88.78% to 89% (parents), 84.03% to 84.6% (students), and 92.35% to 94.1% (teachers) by 2026.

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**INTERIM PERFORMANCE GOAL: Meet annual targets below.**

**DATA SOURCE(s): Annual State Department of Education Report Card Opinion Survey**

| | Average Baseline | | 2022–23 | 2023–24 | 2024-25 | 2025-26 | 2026-27 |
|---|---|---|---|---|---|---|---|
| Parent Satisfaction with Social and Physical Environment | 88.78% (2015-16 to 2018-19) | Projected Data | 88.82% | 88.87% | 88.91% | 88.96% | 89.00% |
| | | Actual Data | | | | | |
| Student Satisfaction with Social and Physical Environment | 84.03% (2015-16 to 2018-19) | Projected Data | 84.14% | 84.26% | 84.37% | 84.49% | 84.60% |
| | | Actual Data | | | | | |
| Teacher Satisfaction with Social and Physical Environment | 92.35% (2015-16 to 2018-19) | Projected Data | 92.70% | 93.05% | 93.40% | 93.75% | 94.10% |
| | | Actual Data | | | | | |

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| School Climate Strategy 1 |
|---|
| We will **partner and engage with families** in order to better understand and address the safety, social, and emotional needs of our students. |

**ACTION PLAN FOR STRATEGY 1:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will provide family engagement through Parent Night outs two times a year to address the social and emotional and physical well being of our students. | 2 times per year (fall and spring) annually, 2021-2027 | Coordinator of Parenting and Social Work | $5,000 | ESSER-2024 | Completion of feedback cards with a success indicator of 50% of responses stating "satisfied" or above on the Likert scale.<br>Attendance Calendar<br>Registration of Guests<br>Documentation of Presentation |
| 2. We will provide family engagement through Let's Talk: Virtual Family Engagement Presentations through Indie Flix for all families. | February, Annually, 2022-2027 | Coordinator of Parenting and Social Work | $10,000 | ESSER-2024 | Completion of feedback cards with a success indicator of 50% of responses stating "satisfied" or above on the Likert scale.<br>Attendance Calendar<br>Registration of Guests<br>Documentation of |

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| | | | | | |
|---|---|---|---|---|---|
| | | | | | Presentation |
| 3. We will provide a Superintendent's Virtual Community Forum once a semester on Facebook Live to increase family engagement. | August, 2021; November 2022; February 2022; and May 2022<br>Beginning in 2023, we will choose a date based on the availability of the Superintendent. | Superintendent<br><br>Director of Communications | $0 | n/a | Number of participants that log on to the webpage will increase to 20% of D5 families between August 2021 and May 2022 (starting from 10%) Beginning in 2023,we will use the same criteria as 2021-22.<br><br>Based on the number of parents that participate, we hope to be able to capture the data that allows us to do a post session feedback parent survey that will ask 3 -5 questions. We would like a completion rate of 20% on survey. |
| 4. We will distribute an electronic district-wide survey focused on various areas determined by the SC Department of Education. | Spring, annually, 2024-2026 | SCDE Survey | $0 | n/a | Completion of surveys with a success indicator of 89% of results ranging from satisfied or above on the Likert scale. |
| 5. We will conduct district-wide Parent Advisory group meetings to include a parent representative from the School Improvement Council and the Parent Teacher Organization from each school. | September through May, monthly, 2022-2027 | Office of Communications with support from other departments Office of Superintendent | $5,000 | Superintendent's Budget | Participants will complete a yearly survey focused on the success of the group measured by organization, ability to express ideas and |

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| | | | | | |
|---|---|---|---|---|---|
| | | | | | opinions, and the facilitation of the groups. We will use a Likert scale with 89% of responses stating "satisfied" or above on the Likert scale. |
| 6. We will offer Ready by 5 Parenting services to all families of children age birth to 5 that sign up for the program. | June 2023-July 2026, daily | Office of Parenting | $5,000 | Parenting | We will increase the number of referrals we receive each year by 10%. |
| 7. We will offer family engagement opportunities to families such as Literacy nights, Math nights, Big Day for PreK and others as decided by the schools and district as a whole. | Annually, 2021-2027 | Schools, Academics and Administration, Parenting and Youth and Family Services | $3,000 | Parenting and Youth and Family Services | We will increase the percentage of attendance by 10% each year. |

*To add a row, go to the last box, right click and add row.*

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| School Climate Strategy 2: |
|---|
| We will implement research-based practices to ensure the **social and emotional development** of our students. |

**ACTION PLAN FOR STRATEGY 2:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. The district's Pk-12 Social Emotional Learning (SEL) Committee will include representatives from a range of support services (including mental health/wellness supports, nursing, administrators) to address SEL needs and recommend responses. | Meetings in the months of September, October, November, February, March, and April, 2022 - 2027 | Coordinator of Parenting and Social Work | $0 | n/a | 100% of committee members will rate at least a 6 on a scale of 1-7 that efforts of the committee lead to the expansion and/or improvement of district initiatives supporting SEL<br><br>Calendar of meetings, documentation of agendas; action items assigned and follow-up notes from each meeting. |
| 2. The Professional Development Schools - District (PDS-D) partnership with USC will provide leadership in applying the principles of improvement science to enhance the social, emotional, and physical wellbeing of students and staff. | Sessions in the months of October, November, February, and March, 2022 - 2027 | Chief of Academics and Administration<br><br>Director of Elementary Education | $0 | n/a | Teaching Pyramid Observational Tool (TPOT) data will indicate that 100% of participating teachers have met the fidelity criteria; a minimum of one educator from each of the PDS-D |

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| | | Director of Secondary Education | | | Goal 2 schools will participate in the Inquiry Matters conference in 2023-2026.<br><br>Calendar of meeting dates, slide decks utilized in training, artifacts from Teacher Leaders and participating staff activities. |
| 3. The district's Mental Health Wellness Team will include leads from school social workers, school psychologists, behavior interventionists, school counselors, school-based mental health counselors, clinical counselors, and student services to monitor, assess needs, and align district-wide efforts for research-based direct services for students and families. | Quarterly meetings each year in August, November, February, and May, 2022-2027 | Coordinator of Parenting and Social Work | $0 | n/a | 100% of team members will rate at least a 6 on a scale of 1-7 that the team's actions help identify needs and redundancies in the actions that support mental health/wellness of students, families, faculty/staff<br><br>Calendar of meetings, meeting agendas. |
| 4. We will utilize a multi-tiered system of support (MTSS) model to provide leadership, professional development, and resources to address student needs as a whole (e.g., academic, attendance, social/emotional) and to integrate systems across the district. | Meetings in September, November, February, and April, 2022-2027 | Director of Academic Intervention and Leadership Development<br><br>Director of Elementary Education | $0 | n/a | 100% of administrators report that their MTSS/triage teams include a review of academic, behavior, and attendance data.<br><br>Calendar of meetings, meeting agenda, resources shared. |

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| | | Director of Secondary Education<br><br>Chief of Student Services and Planning | | | |
| 5. We will provide individual and family counseling services through our Clinical Counseling team in order to address the increase in mental health needs of students and their families. | February 2022 - February 2025, daily | Coordinator of Mental Health Services | $0 | n/a | 100% of principals will rate the value of clinical counselor support to student mental health across the district as a 6 or 7 on a scale of 1-7 on a survey conducted in December of 2022, 2023, and 2024. |

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| School Climate Strategy 3: |
|---|
| We will promote a safe and secure environment through the establishment, teaching, and reinforcement of **school-wide expectations.** |

**ACTION PLAN FOR STRATEGY 3:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will provide discipline code training to all appropriate school and district personnel. | August, annually, 2022-2027 | Student Services Officer | $0 | n/a | 100% of administrators will rate as at least a 6 on a scale of 1-7 that they are able to identify immediate action steps when addressing a school threat, a discipline infraction, and/or recommendation for expulsion process on the exit forms from trainings.<br><br>Calendar for professional development session, attendance log from training. |
| 2. We will provide school administration teams with resources and support in best practices for establishing, teaching, and reinforcing school-wide expectations. | August, annually, 2022-2027 | Student Services Officer<br><br>Safety Officers | $0 | n/a | 100% of school-based action plans cite specific strategies for establishing, teaching, and reinforcing |

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| | | | | | school-wide expectations.<br><br>Google doc including resources and contacts for support shared with Principals and on agenda for Principals' meeting; documented school visits; Safety Audit documentation; calendar of professional development sessions. |
| 3. We will provide expectations coaches with training and support for their role in teaching and reinforcing school-wide expectations. | Training will be held during the months of: October, November, January, February, and March, 2022-2027 | Student Services Officer | $0 | n/a | 100% of surveys of principals with expectation coaches rate satisfaction with the coach's role in teaching and reinforcing school-wide expectations as at least a 4 out of 5.<br><br>Calendar of professional development sessions, documents and artifacts relevant to training. |
| 4. We will provide parents with opportunities to learn about their role in supporting school-wide expectations via community events. | October and February of each year, 2022-2027 | Chief of Student Services and Planning | $0 | n/a | After district-wide parenting events, an exit survey will be provided for parents. The survey will indicate that at least 80% of parents are satisfied with the information, resources, |

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| | | | | | and strategies provided during the parenting event.<br><br>Calendar of events, creation of video and/or documents, attendance data |
| 5. We will review discipline data each quarter to identify trends by incident type, school, location, time of day, or student. District administration will also look for trends in bullying/harassment and state and federally reported data to determine potential school and district level actions. | At the beginning of each month, 2022-2027 | Student Services Officer<br><br>Department of Accountability | $0 | n/a | After quarterly discipline data is shared with each school by Student Services, 100% of administrative teams will be able to identify two areas of focus on the Discipline Data Review form for the following quarter that are specifically related to discipline data provided. |

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| School Climate Strategy 4: |
|---|
| We will promote a safe and secure environment through our **bullying prevention and intervention** programs and practices. |

**ACTION PLAN FOR STRATEGY 4:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will provide a training on discipline infractions, discipline procedures, and threat assessments to all school administrators | August, annually, 2022-2027 | Student Services Officer<br><br>Director of Student Services | $0 | n/a | Exit forms will indicate that 100% of administrators will state that they are able to identify immediate action steps when addressing a school threat, a discipline infraction, and/or recommendation for expulsion process at a rate of at least a 6 on a scale of 1-7. |
| 2.We will provide additional bullying, intimidation, harassment, and cyberbullying resources for teachers, students, and families to all school administration teams. | August and January, annually, 2022-2027 | Student Services Officer<br><br>Director of Student Services | $0 | n/a | At least 90% of administrators will indicate on a survey that they are able to successfully access the section pertaining to Bullying on the Student Services Google site and on the District 5 website. At least 90% of Parent |

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| | | | | | Forum attendees will respond that they know how to access resources, who to contact to address concerns, and are aware of the STOPit feature.<br>Other evidence will include Think Tank 2.0 agenda items, Think Tank sessions/sign in logs on bullying, creation of video and/or documents. |
| 3. We will create a Think Tank 2.0 Team to assist in providing resources, implementing professional development, suggesting curriculum, and communicating strategies to school administrators on various topics to include bullying, intimidation, harassment, and cyberbullying. | August of the 2022-2023 academic year. | Student Services Officer<br><br>Think Tank 2.0 Team | $0 | n/a | Calendar of professional development sessions, documents and artifacts relevant to initial Think Tank session; 100% of principals will state they are satisfied at a level of at least a 4 out of 5 with the resources and training provided by the Student Service Officer related to teaching and reinforcing bullying expectations. |
| 4. We will continue to promote the implementation of STOPit across all schools in District 5 including Spanish access for students. | August, October and January, annually, 2022-2027 | Student Services Officer<br><br>Director of Student Services | $0 | n/a | 100% of new school administrators will attend StopIT training and will state they are satisfied at a level of at least a 4 out of 5 with the StopIT resources and training |

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| | | | | | provided by the Student Service Officer.<br><br>100% of administrators across the district will have access to StopIT in order to monitor reports, data collection, and to identify situations students are experiencing that need further support.<br><br>100% of Elementary School Counselors teaching framework will state include StopIt lessons for all students. |
| 5. We will review discipline data connected directly with bullying, intimidation, harassments, and/or cyberbullying with school administration to identify and address trends, hot spots, and intervention. Plans related to these areas will be included in future action steps. | November and March, annually, 2022-2027 | Student Services Officer<br><br>Director of Student Services | $0 | n/a | 100% of school-based action plans will list two specific strategies for establishing, teaching, and reinforcing school-wide expectations related to bullying, intimidation, harassment, and/or cyberbullying.<br><br>Google Site to include Bullying information; Meeting agenda to document data and discussion that tracks ongoing monitoring of |

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| | | | | | bullying data, discipline data from PowerSchool to provide ongoing data and trends, STOPit reports data to identify trends in reports of our review of the data directly leading to schools creating action plans in response to trends. |

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| School Climate Strategy 5: |
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| We will provide a safe and secure environment for students through the development and implementation of **school safety** procedures. |

**ACTION PLAN FOR STRATEGY 5:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
| --- | --- | --- | --- | --- | --- |
| 1.The district and schools will develop and implement an annual calendar of safety drills. | August - Fire Drill within the first ten days of school<br>September - Fire Drill & "Secure" drill (formerly known as lockout drill)<br>October - Fire Drill & Earthquake Drill (Great Shakeout)<br>November - Fire Drill & Lockdown Drill (Active Shooter presentation/video)<br>December - Fire Drill (If possible, allow for staff or student initiated)<br>January - Fire Drill<br>February - Fire Drill & Lockdown drill (Active Shooter presentation/video)<br>March - Fire Drill (If possible, allow for staff or student initiated) & State-wide recommended Tornado Drill<br>April - Fire Drill & | District Safety Officers<br><br>School Administrators over Facilities | $0 | n/a | School Drills will be monitored monthly via Google Form. 100% of schools will have completed their monthly drill.<br><br>District plan - District drill calendar will comply with all federal and state mandates (All required drills scheduled on calendar) |

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| | "Secure" drill (formerly known as lockout drill)<br>May - Fire Drill<br>June - Fire Drill | | | | |
| 2. We will develop an Emergency Operations Plan for the district and each school. The plans will be revised annually. | October, annually, 2022-2027 | Safety Officers<br><br>School Administrators over Safety<br><br>School Resource Officers | $0 | n/a | School Plans - 100% of schools will have a plan. 100% of schools will have an accurate count of students and count of students with specific transportation needs. 100% of schools will submit updated school maps with relevant safety details. |
| 3. We will conduct semi-annual active shooter training and gunfire recognition training in collaboration with local law enforcement. | Active Shooter Training - August and January, annually, 2022-2027<br><br>Gunfire Recognition Training - July and August, annually, 2022-2027 | Safety Officers<br><br>School Administrators over Safety | $0 | n/a | Safety Officers observe active shooter / "secure" drills at individual schools (see Drill action step). 100% of schools will follow the correct procedures during active shooter / "secure" drills. |
| 4. We will revise and conduct staff training on its reunification plan. | Initial training and solicited input on the district plan - October 2021 | Safety Officers | $5,000 (2022 only) | General Budget | All Memorandum of Understandings with reunification sites will be updated by August of each year. |

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| | March 2022 - Plan is fully revised.<br><br>May 2022 - Training on revised plans.<br><br>October, annual training, 2022-2027 | | | | After training, all members of the reunification team will be able to state their responsibility via Google Form. |
| 5. We will purchase and distribute weather radios and bi-directional amplifiers for each school and site. | Safety Inspection to include check on weather radio - October, January, March, June, quarterly, 2022-2027 | Safety Officers | $2,000,000 | General Budget<br><br>Hazard Mitigation Grant | 100% of schools will have weather radios by 2021.<br><br>During safety inspections, all schools will have their weather radios operational. |
| 6. We will revise and conduct staff training on school-specific rally points. | Initial ALCE training - August 2022 - February 2023<br><br>Training - August, annually, 2023-2027 | Safety Officers | $0 | n/a | After training, all school staff members will be able to state their school's specific rally point (can measure via Google Form). |
| 7. We will ensure all Safety Officers are certified on ALICE Active Shooter Training and are Stop the Bleed Instructor-Certified. | April 2022 - Two Safety Officers certified in | Safety Officers | $2000 | Grants- specifically SLED grants geared toward | 100% of the Safety Officers in the school district will be certified instructors in ALICE |

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| | ALICE Active Shooter Training, prior certification in Stop the Bleed<br><br>New Safety Officers will obtain the ALICE Certification and Stop the Bleed Certification - 2022-2027 | | | schools and attempting to certified instructors | Active Shooter Training and Stop The Bleed Training |
| 8. We will establish a central monitoring point for cameras and access controls within each school. The focus of this will be the high schools. | July 2023 - Implement Standard Operating Procedures as to how cameras will be monitored and information dispatch<br><br>September 2023 - June 2024 - Implement a pilot program at one high school to gauge how initiative works | Safety Office w/ school administrators & DO Technology Department | $15000 | Combination of general funds and potential grants | Decrease in overall student discipline. Would strive for a 20 to 25% decrease in overall discipline referrals. |

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| | July 2024 - Assess pilot program with community input<br><br>August 2024-June 2027 - Potential implementation of centralized monitoring/incident command room per school | | | | |
| 9. We will create a safe location for individuals to stay between the dismissal of school and the beginning of a sporting event. This is focused on the football season but could expand to year-round implementation. | August 2023 - Implement a study hall prior to each home football game at each high school.<br><br>December 2023 - Review overall operation and any issues that arose<br><br>January 2024 - June 2027 - Continue providing a study hall prior | School administrators & school specific sport coaches (rotate supervision amongst all teams). The Safety Office can assist with scheduling. | $0 | n/a | Decrease in overall student discipline w/ goal of decrease by 15%. Also any measurable increase in student athlete academic grades. |

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| | to home football games in the district | | | | |
| 10. We will train after-school programs in ALICE and Stop The Bleed protocols. | Initial Training - August - December, 2023<br><br>Training for new staff, quarterly, January 2024 - January 2027 | Safety Officers | $0 | n/a | All counselors are trained to the same level. |
| 11. We will implement a staggered roll out of weapon detectors. | June 2023 - Begin placing additional metal detectors in high schools<br><br>August 2023- Implement 100% student check at high school level<br><br>January 2024- Implement 100% student check at middle school level<br><br>August 2025 - Implement 100% student | District Administration and Safety Office | $400,000 | General Budget/ Potential Grants | All schools will have weapon detectors and utilize them for 100% of the student population. |

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| | check at elementary school level, district-wide check<br><br>August 2025-June 2027, daily, Continue to check students via weapon detectors on school grounds as standard practice | | | | |

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| School Climate Strategy 6: |
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| We will provide a safe, secure, and equitable **physical environment** for all students by monitoring, maintaining, and improving district-owned **facilities**. |

**ACTION PLAN FOR STRATEGY 6:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. To provide an additional layer of security, we will add a vestibule to the front entry of our schools and main offices. | Start Summer of 2023 and complete Summer 2027 | Director of Facilities | $1,500,000 | Capital Funds | 25% of schools to be completed by 2024<br><br>50% of schools to be completed by 2025<br><br>75% of schools to be completed by 2026<br><br>100% of schools to be completed by 2027 |
| 2. To ensure proper conditioning of our schools, we are conducting an assessment of our HVAC assets. We will replace a minimum of 5 end-of-life (EOL) units per year. | Start Summer of 2023 and complete Summer 2027 | Director of Facilities | $4,000,000 | Capital Funds | 5 units to be replaced by 2024<br><br>10 units to be replaced by 2025<br><br>15 units to be replaced by 2026<br><br>20 units to be replaced |

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| | | | | | by 2027 |
| 3. We will ensure that 100% of district stadiums have separate home and visitor sides. Gates will be installed to separate. | Start Summer 2023 and complete by 2027 | Director of Facilities along with Safety Office | $300,000 | Capital Funds | 33% of stadiums will be completed by 2024<br><br>66% of stadiums will be completed by 2025<br><br>100% of stadiums will be completed by 2027 |
| 4. We will replace the freezers at the following schools: CIS, IHS, DFHS, DFMS. | Start summer 2023 and complete summer 2027 | Director of Facilities along with Student Nutrition Office | $500,000 | Capital Funds | 25% of schools to be completed by 2024<br><br>50% of schools to be completed by 2025<br><br>75% of schools to be completed by 2026<br><br>100% of schools to be completed by 2027 |
| 5. We will provide upgrades to high school athletic fields. This includes drainage, lighting, and facilities. | Start summer 2023 and complete summer 2027 | Director of Facilities | $1,000,000 | Capital Funds | 33% of stadiums will be completed by 2024<br><br>66% of stadiums will be completed by 2025<br><br>100% of stadiums will be completed by 2027 |

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# PERFORMANCE GOAL AREA (2): *Student Achievement*

**PERFORMANCE GOAL:**

*Per SBE Regulation 43-261, measurable performance goals, written in five-year increments, shall be developed to address the major areas of discrepancy found in the needs assessment in key areas reported in the district and school report cards.*

SMART goal must include:
WHO will do WHAT, as measured by HOW and WHEN.

We will provide challenging curricula focused on the academic development and college and career readiness of all students as measured by:

- students in grades 2-8 will have a Median Student Growth Percentile of 55 or above on MAP Growth Math and 56 or above on MAP Growth Reading by 2026
- the graduation rate will increase from 90.06% to 91.16% by 2026
- the percentage of students who are college or career ready will meet or exceed 78% through 2026

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**INTERIM PERFORMANCE GOAL: Meet annual targets below.**

**DATA SOURCE(s): NWEA MAP Growth Reports and South Carolina School Report Card**

| | Average Baseline | | 2022–23 | 2023–24 | 2024-25 | 2025-26 | 2026-27 |
|---|---|---|---|---|---|---|---|
| MAP Growth - Fall to Spring - Median Student Growth Percentile - Math | 2015-16 - 57<br>2016-17 - 57<br>2017-18 - 52<br>2018-19 - 52 | Projected Data | 55 | 55 | 55 | 55 | 55 |
| | | Actual Data | | | | | |
| MAP Growth - Fall to Spring - Median Student Growth Percentile - Reading | 2015-16 - 61<br>2016-17 - 61<br>2017-18 - 60<br>2018-19 - 56 | Projected Data | 56 | 56 | 56 | 56 | 56 |
| | | Actual Data | | | | | |
| Graduation Rate | 90.06% (2015-16 to 2019-20) | Projected Data | 90.28% | 90.50% | 90.72% | 90.94% | 91.16% |
| | | Actual Data | | | | | |
| College or Career Readiness | 81.5% (2017-18 to 2019-20), 78.2% | Projected Data | 78% | 78% | 78% | 78% | 78% |
| | | Actual Data | | | | | |

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| | **(2019-20, Method for calculating CCR changed in 2019-20)** | | | | | | |

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| Student Achievement Strategy 1: |
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| We will provide challenging curricula and implement researched-based instructional practices to ensure the academic development and college or career readiness of **all students**. |

**ACTION PLAN FOR STRATEGY 1:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will provide Professional Development for teachers and administrators on high effect size teaching strategies. | August, February, March, annually, 2022-2027 | Coordinator of Professional Development<br><br>Director of Elementary Education<br><br>Director of Secondary Education<br><br>Content Coordinators | $80,000 | Title II and Title IV | At the conclusion of the professional development, 80% of participants will agree or strongly agree that professional development will positively impact their teaching. |
| 2. We will utilize pertinent data to ensure that each student is provided with appropriately challenging, developmentally appropriate curricula, and appropriate targeted interventions. | Progress Monitoring meetings with schools in October/ November, January/ | Director of Elementary Education<br><br>Director of Secondary Education | $0 | n/a | Students will have a median conditional growth percentile of 55 for math and 56 for reading.<br><br>Science Benchmark Data |

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| | February, and March/April, annually, 2022-2027 | | | | Review for grades 6 and high school biology, courses 3 times each year to support standards mastery at 60% or above. |
| 3. We will use reading universal screeners to monitor students' progress in K-1 and as needed in grades 2 - 5 to ensure that students are receiving needed interventions. | BOY: August-September, MOY: November-December EOY: March, annually, 2022-2027 | Coordinator of ELA<br><br>Director of Elementary Education<br><br>School level Reading Coaches | $62,585.00 | General Fund - Office of Academics and Administration | 100% of at-risk students will have documented interventions in Enrich. Elementary Multi-Tiered System of Support meetings and data reviews (FastBridge, MAP). |
| 4. We will continue the implementation of Professional Learning Communities (PLC) to foster the discussion of individual student needs and how best to meet those needs within the classroom setting. | Monthly, August 2021 - June 2027<br><br>2nd Tuesday of each month elementary; 3rd Tuesday of each month Secondary; Schools will have PLCs as well. | School Level Principals<br><br>Director of Elementary Education<br><br>Director of Secondary Education<br><br>Content Coordinators | $30,000 | Title II and Title IV | At least 80% of teachers will be actively assigned to a Professional Learning Community. |
| 5. We will utilize updated curriculum frameworks and Instructional | August 2021-June | Content Coordinators | $56,000 Classlink | Esser and Office of | We will use Classlink to monitor usage of |

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| Technology to develop assessments, adaptive assignments, and curricula to meet the rigor and demands of state standards. | 2027, daily | Digital Integration Specialists | $259,000 Progress Learning for 3 years<br><br>$62,539 6-8 DreamBox Learning for 3 years<br><br>K-5 DreamBox Learning State funded for 3 years<br><br>Apex Learning $115,000 a year for unlimited 6-12 Courses and Tutorial usage<br><br>$39,600 All in Learning<br><br>$79,270 Pear Deck or 3 years<br><br>$43,875 Screencastify for 3 years<br><br>$29,732 Kami for grades 6-12 | Academics and Administration<br><br>Technology Services (Class Link) | software with a goal of at least 80% implementation of programs purchased by the district.<br><br>The 9GR Graduation Rate percentage will be greater than 88%. |

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| | | | $56,306 Seesaw for 3 years grades PK-2<br><br>Discover Education/SAF ARI Montage: State Funded | | |
| 6. We will provide all high school students with high quality personalized college and career preparation materials and resources. This includes career activities such as résumé workshops and career planning as well as college readiness activities to include parent workshops on dual enrollment, the college application process, and college showcases. | Jan 2022-Oct 2024 USATestPrep<br><br>Each year - AP Classroom | Directors<br><br>Digital Integration Specialists<br><br>Career Development Facilitators<br><br>Content Coordinators & Specialists<br><br>AP Testing Coordinators | $300<br><br>$259,000 Progress Learning for 3 years | General Fund - Office of Academics and Administration<br><br>Esser | The Progress Learning Dashboard will indicate a usage of 80% or higher (ACT, SAT, AP, Accuplacer, WIN, ASVAB). |
| 7. We will use NWEA MAP to monitor students' progress in secondary intervention (5th-8th) to ensure that students are receiving targeted instruction in intervention. This will include monitoring Dreambox usage and growth. | BOY: August-September, MOY: November-December EOY: March, | Assistant Principals for Instruction<br><br>Coordinator of ELA/Secondary Specialist | $0 | n/a | We expect that the Median Conditional Growth Percentile for Reading Intervention students will be 56 when monitored in the Winter and Spring. |

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| | annually, 2022-2027 | of Math/ Elementary Specialist<br><br>Director of Secondary Education | | | At least 80% of students will complete at least 5 lessons in Dreambox per week. |
| 8. We will use Academic Assessment Coaches in high schools to assist students in developing test-taking skills and strategies to increase performance on high-stakes testing associated with college and career readiness. | Monthly during the school year, August 2021 - June 2027 | Supervised by the Office of Academics and Administration and school principals | $3000 stipend per coach. 2 at each high school.<br><br>$24,000 | General Fund | College and Career Readiness percentages will be at least 78% at the end of the year and the monthly reports from Enrich will indicate at least 78% of students are on track to be College or Career Ready.<br><br>SAT/PSAT Recognition awards.<br><br>Number of National Merit Semi-finalists. |

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| Student Achievement Strategy 2: |
| --- |
| We will provide challenging curricula and implement researched-based instructional practices to ensure the academic development and college or career readiness of **multilingual learners**. |

**ACTION PLAN FOR STRATEGY 2:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
| --- | --- | --- | --- | --- | --- |
| 1. We will provide professional development for general education teachers to help them serve their multilingual students as well as communicate with our multilingual families. | Monthly, August-May 2021-2027 | ML Teachers | $0 | n/a | We will use an end of year Google Survey that indicates 90% of teachers state that the monthly PD improved their ability to work with ML students and/or their families. |
| 2. We will implement the curriculum resource, ILit ELL, with multilingual students at the secondary level to increase language proficiency. | Weekly, September-May 2021-2024 | ML Teachers | $10,393.85 | Federal Funds Title III | Using ILit ELL dashboard reports for the implementation year, student use will reflect not less than 1 hour per week. |
| 3. We will implement Lexia English, an online language learning program, with elementary and intermediate level students to increase language proficiency. | Weekly, September-May 2021-2024 | ML Teachers | $8,750 | Federal Funds Title III | Using Lexia English dashboard reports for the implementation year, student use should reflect 30-45 minutes per week. |

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| 4. We will hold Family Literacy Nights once a month to engage families in language learning activities across the content areas. | Monthly, September-May 2021-2024 | ML Teachers | $6,321.81 | Federal Funds Title III | On surveys administered to Family Night attendees throughout the year, 90% of respondents will state that they were satisfied with the events at a level of 4 out of 5 on a Likert scale. |
| 5. We will staff our Summer Reading Camp with a certified ESOL teacher to serve multilingual camp attendees and support the teachers of those multilingual. | Summer 2021-24 | ML Program Specialist | $8,000 | Federal Funds Title III | 100% of ML students attending Summer Reading Camp will maintain or show growth in their text reading level from the Spring administration to the post-camp administration.<br><br>Summer School Data Reports. |
| 6. We will, as schedules allow, level the secondary ML blocks, according to ACCESS scores. (Beginner- 1.0-2.5 Intermediate- 2.6-3.5.) | Fall 2023-27 | MLPT<br>MLPS | $0 | n/a | 80% of ML students in this leveled class will reach their growth points. ACCESS data will be used for this determination. |

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| Student Achievement Strategy 3: |
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| We will provide challenging curricula and implement researched-based instructional practices to ensure the academic development and college or career readiness of **students with disabilities**. |

**ACTION PLAN FOR STRATEGY 3:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will monitor the progress of students with disabilities in each 9GR cohort towards graduation (grades, test scores, least restrictive environment) and college and career readiness.Implement appropriate interventions to address concerns (tutoring participation, instructional setting). | Monthly (end of month), September-May, 2022-2027 | Director of Special Services<br><br>High School Placement Chairs<br><br>High School Assistant Principals for Instruction<br><br>Director of Secondary Education | $80,000 in salary and benefits annually for two assistants ($40,000 per assistant)<br><br>$108,000 for tutoring ($12,000 per month) | Grant - ATSI Funds<br><br>Federal funds (IDEA) | 1. Increased graduation rate of diploma track students with disabilities from 59.73% to 65%.<br>2. Tracking documents by 9GR for each high school. |
| 2. We will monitor grades 2-8 ELA and math MAP data for the special education subgroup after the fall, winter, and spring testing windows through special services instructional data team. This will include a review of grades 2-8 | Review data after Fall (September), Winter (January), and Spring (April) | Director of Special Services<br><br>Coordinator of Special | $0 | n/a | 1. Winter and Spring MAP data will indicate that students with disabilities have a Median |

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| ELA and math MAP with elementary and middle level placement chairs after each testing window. | administrations of MAP and Fastbridge in data team and with PC's, annually, 2022-2027 | Services<br><br>Special Services Instructional Specialist<br><br>Placement Chairs | | | Conditional Growth Percentile (Fall to Winter, Fall to Spring) of 55 or above in Math and 56 or above in Reading.<br>2. Running Special Services Instructional Data Team meeting minutes.<br>3. Placement Chair Meeting presentations |
| 3. We will provide monthly professional development on High Leverage Practices for teachers of students with disabilities. | Monthly, August-May, 2021-2027:<br><br>Second Tuesdays for middle and high<br><br>Third Tuesdays for elementary and preschool | Director of Special Services<br><br>Coordinator of Special Services<br><br>Instructional Specialist for Special Services | $600 per facilitator (Up to $6,000) | IDEA | 1. PPTs and handouts from Leadership Tuesdays<br>2. Pre and post surveys of staff to measure understanding of high leverage practices for students with disabilities. 90% of respondents will indicate satisfaction with the professional development at |

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| | | | | | level of 4 or 5 out of 5. |
| 4. We will monitor the progress of South Carolina High School Credential students towards earning at least one industry recognized credential. | Quarterly, August-May, 2021-2026:<br><br>PATH planning | Director of Special Services<br><br>Coordinator of Special Services<br><br>Instructional Specialist for Special Services<br><br>District Job Coach | Estimation of $1000 per year for cost related to registration for certification exams. | IDEA | 1. PATH planning notes will show that 75% of SC Credential-path students will earn an industry recognized credential.<br><br>2. CCR data for special education subgroup.<br><br>3. Tracking data of SC Credential students that have earned at least one industry recognized credential. |
| 5. We will provide professional development to paraprofessionals in the areas of academic and behavioral supports. | August, October, and February, annually, 2021-2027:<br><br>3x yearly #LeaD5 professional development days for teachers | Special Education Coordinators | $0 | n/a | 1. PPTs from each training<br><br>2. Pre and post surveys of staff to measure understanding of high leverage practices for students with disabilities. 90% of respondents |

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| | | | | | will indicate satisfaction with the professional development at level of 4 or 5 out of 5. |
| 6. We will create and maintain a guidance document for teachers and paraprofessionals that provides recommendations for curriculum and instructional material based on student academic or behavioral needs. | Monthly review, August-May, 2021-2027:<br><br>Review monthly in the special services instructional data team | Director of Special Services<br><br>Coordinator of Special Services<br><br>Instructional Specialist for Special Services | $0 | n/a | 1. Running notes from the Special Services Instructional Data Team.<br><br>2. Curriculum Resources document shared and reviewed at least 4 times during Placement Chair meetings.<br><br>3. Curriculum survey distributed to teachers BOY, MOY, and EOY to measure their level of satisfaction with the recommended curriculum. 90% of respondents will indicate satisfaction with the curriculum at level of 4 or 5 out of 5. |

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| Student Achievement Strategy 4: |
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| We will provide challenging **Career and Technical Education** curricula and opportunities to ensure graduates are **career ready**. |

**ACTION PLAN FOR STRATEGY 4:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
| --- | --- | --- | --- | --- | --- |
| 1. We will monitor the number of Career and Technical Education program completers. | Monitoring, October, January, March and June, annually, 2022-2027 | Director of Career and Technical Education<br><br>Assistant Director of Career and Technical Education<br><br>High School Department Chairs<br><br>Career Coordinator<br><br>Career Specialists | $0 | n/a | Increase the student completer rate by 2% by 2026.<br>In October, we will analyze the number of CTE students with a passing grade at the end of the first nine weeks. In January, we will analyze the number of CTE students with a passing grade at the end of the second nine weeks. In March, we will analyze the number of CTE students with a passing grade at the end of the third nine weeks. In June, we will analyze the number of CTE students with a passing final grade. 2021 number of completers 615 |

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| 2. We will monitor Career and Technical Education student industry certifications that align with their program of study. | Calculate the rate in June of each school year, annually, 2022-2027 | Director of Career and Technical Education<br><br>Assistant Director of Career and Technical Education<br><br>High School Department Chairs<br><br>Career Coordinator<br><br>CAreer Specialists | $10,000 for student industry certification fees | South Carolina Office of Career and Technical Education student certification funds. Fund Code 328 | Exceed the State CTE Perkins V determined performance level 5S1: Program Quality – Attained Recognized Postsecondary Credential. State determined performance level: 2022-2023 35.7%, 2023-2024 36% |
| 3. We will develop and implement a Career and Technical Education mathematics curriculum. | June 6 - 10, 2022 | Director of Career and Technical Education<br><br>Assistant Director of Career and Technical Education<br><br>High School Department Chairs | $1,200.00 in supplemental pay for one math teacher. | District General Fund | Development of a 10-hour mini math course for CTE programs by June 2022. |

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| | | CTE Teachers | | | |
| 4. We will develop and implement a Career and Technical Education science curriculum. | June 6 - 10, 2022 | Director of Career and Technical Education<br><br>Assistant Director of Career and Technical Education<br><br>High School Department Chairs<br><br>CTE Teachers | $1,200.00 in supplemental pay for one science teacher | District General Fund | Development of a 10-hour mini science course for CTE programs by June 2022. |
| 5. We will develop and implement a Career and Technical Education ELA curriculum | June 6 - 10, 2022 | Director of Career and Technical Education<br><br>Assistant Director of Career and Technical Education<br><br>High School Department Chairs<br><br>CTE Teachers | $1,200.00 in supplemental pay for one ELA teacher | District General Fund | Development of a 10 hour mini ELA course for CTE programs by June 2022. |

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| 6. We will increase the CTE Four-Year graduation rate. | Calculate the rate in June of each school year, annually, 2022-2027 | Director of Career and Technical Education<br><br>Assistant Director of Career and Technical Education<br><br>High School Department Chairs<br><br>School counselors | $0 | n/a | Exceed the State CTE Perkins V determined performance level 1S1: Four-Year Graduation State determined performance level: 2022-2023 91.5%, 2023-2024 92% |
| 7. We will increase CTE Postsecondary Placement or advanced training, military service, a service program, the Peace Corps or employment. | Calculate the rate in June of each school year, annually, 2022-2027 | Director of Career and Technical Education<br><br>Assistant Director of Career and Technical Education<br><br>Career Coordinator<br><br>Career Specialists | $0 | n/a | Exceed the State CTE Perkins V determined performance level 3S1: Post-Program Placement State determined performance level: 2022-2023 93.7%, 2023-2024 94% |

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| 8. We will increase Nontraditional Program Enrollment. | Monitor enrollment numbers at the 10 day mark and in June of each school year, annually, 2022-2027 | Director of Career and Technical Education<br><br>Assistant Director of Career and Technical Education<br><br>School counselors<br><br>Career Coordinator<br><br>Career Specialista | $0 | n/a | Exceed the State CTE Perkins V determined performance level 4S1: Non-traditional Program Concentration<br>State determined performance level: 2022-2023 12.2%, 2023-2024 12.4% |

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| Student Achievement Strategy 5: |
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| We will provide meaningful opportunities for **adult learners** to become college or career ready. |

**ACTION PLAN FOR STRATEGY 5:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
| --- | --- | --- | --- | --- | --- |
| 1. We will offer courses in the following areas: GED preparation, High School Diploma Attainment, English Language Acquisition, Standardized Test Preparation, Career Preparation, and Academic Enrichment. | September - July, daily, 2021-2027 | Director of Adult Education | $10,000 | Federal Funds State Funds | Quarterly check of the LACES database will show active student enrollment in GED prep, Diploma, ESL, Test Prep, Career Prep, and Academic Enrichment classes. |
| 2. We will develop an Individual Learning Plan for each Adult Education student who is enrolled in GED and Diploma classes. The Individual learning plans will outline the students' progress towards his/her academic goals. | Plan Development at the beginning of each monthly orientation period, monthly, 2021-2027 | Coordinator of Adult Education | $0 | n/a | 100% of Adult Education students enrolled in GED and Diploma programs will have Individual Learning Plans by the end of the academic year. |
| 3. We will monitor student progress towards academic goals that are outlined in the Individual Learning Plans and provide support (tutoring, additional resources, placement changes, etc.) as indicated by student progress. | October, January, April and June, annually, 2021-2027 | Coordinator of Adult Education | $0 | n/a | The end of year Desktop Monitoring Tool (DMT) will show measurable skills gains as measured by pre and post TABE testing or high school |

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| | | | | | credential attainment for 50% of enrolled students. |
| 4. We will increase the number of students who, while enrolled in Adult Education, also are engaged in activities that introduce and prepare them for post-exit outcomes (i.e. military service, employment and/or postsecondary education/training programs). | September - July (AE Academic Year), daily, 2021-2027 | College and Career Navigator | $0 | n/a | The end-of-year review of the College and Career Navigator Accountability Report (CNAR) will show 70% of students have been engaged in at least one activity that prepares them for post-exit outcomes. |
| 5. In an effort to provide equity in access to all Adult Education students seeking a high school diploma, we will implement a proficiency-based grading grading system in awarding high school credits. | August-June, daily, 2022-2027 | Director | $0 | n/a | We will have on file an approval letter from the State Department of Education as well as a copy of the approved proficiency-based grading plan. |

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| Student Achievement Strategy 6: |
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| We will offer and support differentiated opportunities for challenging curricula through **magnet and choice programs**. |

**ACTION PLAN FOR STRATEGY 6:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
| --- | --- | --- | --- | --- | --- |
| 1. We will provide professional development on cooperative learning during the period in which the grant is funded. | October 1, 2022-September 30, 2023 (Grant fiscal year) | Cooperative Learning Coach | $60,000 (through September 30, 2023) | MSAP Magnet Grant funds (through September 30, 2023) | The Implementation rubric tracked by Magnet Lead Teacher will indicate that:<br>In the annual teacher survey, at least 80% of teachers will report that students are engaged in learning.<br>The percentage of administrative staff at each school who participate in at least 24 hours of annual PD in systemic reforms (desegregation, equity, and cooperative learning strategies) will be at least 95%.<br>The percentage of teachers at each school who participate in at least 60 hours of annual |

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| | | | | | professional development in systemic reforms will be at least 95% |
| 2. We will offer the Discover 5 magnet programs at LES STEAM Magnet, IHS IB Career-related Programme, NRES Arts Magnet, and HECES Montessori Magnet. | October 1, 2022- June 30, 2027, daily | Magnet Director<br>Magnet school principals<br>Magnet Lead Teachers | $2,500,000 (through September 30, 2023) | MSAP Magnet Grant funds (through September 30, 2023) | The Implementation rubric tracked by Magnet Lead Teacher will indicate that:<br>In the annual teacher survey, at least 80% of teachers will report that students are engaged in learning.<br>The percentage of administrative staff who participate in at least 18 hours of annual professional development in site-based, thematic content will be at least 95%.<br>The percentage of teachers who participate in at least 30 hours of annual PD in site-based, thematic content will be at least 95%. |
| 3. We will offer the following magnet programs: STEM at DFHS, Escolares at HWES, SHHS Career Pathways Magnet, SOES Media Magnet, DFES Academy of Environmental Sciences, | October 1, 2022- June 30, 2027, daily | Magnet Office<br>Magnet school principals<br>Office of Academics | n/a | General Fund | 100% of existing magnet schools/programs will be offered.<br>Four magnet schools/programs will |

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| HECES Leadership Magnet, I AM Escolares at IMS, This Is Escolares at IHS and IB Diploma Programme at IHS International School of the Arts. | | | | | apply for the MSA Merit Award.<br>Annual magnet booklet will be created annually. Booklet lists and describes current magnet programs and magnet schools in the district. |
| 4. We will market the Choice & Magnet opportunities through the magnet office using flyers, information nights, magnet fairs (November - January) Choice & Magnet booklet, and community events. | October 1, 2022-<br>June 30, 2027, daily | Magnet Office and Communication Office, Marketing specialist | $10,000 (supplies,etc)<br>$60,000 Marketing specialist (salary)<br><br>(through September 30, 2023) | MSAP Magnet Grant funds (through September 30, 2023) | Attendance at Magnet Fairs: at least 150 families will attend the annual Magnet Fair.<br>80% of parents will indicate satisfaction on the exit survey at the Magnet Fair.<br>Marketing resources included:a magnet booklet, postcard mailers, 2 billboards, Chapin Chamber marquee, Lake Murray Lifestyle magazine ad, Irmo Chamber Visitors/Relocation guide, Facebook ads, social media posts.<br>Displays at local parks, Chamber meetings, Juneteeth, National Night Out, Pop Up events, Okra Strut |
| 5. Each magnet school will be responsible for their own open house | December-Jan uary, | Magnet school Principals and | | | Attendance will be recorded and schools will |

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| information nights. | 2022-2027, annually | designated magnet leads | | | reach out to attendees with follow up information |
| 6. Magnet information will be disseminated through the community to improve internal and external communication.<br>Engage and enlist parents/students to speak about programs that work for their child and why they selected them. | October 1, 2022-June 30, 2027, daily | Magnet school director will speak before various stakeholder groups; Year end meetings, Nuts and Bolts, Leadership Summit<br>Board Meetings | n/a | n/a | Magnet Director will answer questions to confirm understanding of the magnet options |
| 7. The Discover 5 magnet schools will participate in the Equity of Effort Framework professional development. | October 1, 2022-September 30, 2023 (Grant fiscal year) | Magnet Office<br>ELI (Dr. Donna Elam) | $110,000 (through September 30, 2023) | MSAP Magnet Grant Funds (through September 30, 2023) | The Implementation rubric tracked by Magnet Lead Teacher will indicate that:<br>The percentage of administrative staff at each school who participate in at least 24 hours of annual PD in systemic reforms (desegregation, equity, and cooperative learning strategies) will be at least 95%.<br>The percentage of teachers at each school who participate in at least 60 hours of annual PD in systemic reforms will be at least 95%. |

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| 8. We will utilize a choice lottery system. | January-February, 2022- 2027, annually | Magnet Office -<br><br>Prepaid by MSA Grant through Y5<br>Y2 - $12,360.00<br>Y3 - $12,730.80<br>Y4 - $13,112.72<br>Y5 - $13,506.11 | $30,000<br><br>$51,709.63 | MSAP Magnet Grant Funds | We will maintain or increase the number of applicants each year (updated annually) with current data:<br>How many applications received<br>How many 1st choice %<br>How many 2nd choice %<br>How many opening per grade level at "schools open to choice" |
| 9. We will offer transportation to the Discover 5 magnet schools. | October 1, 2022- September 30, 2023, daily (Grant fiscal year) | Transportation Office | $160,000 (through September 30, 2023) | MSAP Magnet Grant Funds (through September 30, 2023) | The district will offer transportation to 100% of students enrolling in Discover 5 magnet programs. |
| 10. We will continue professional development in the various magnet themes<br>(training and supplies). | October 1, 2022-June 30, 2027, determined by schools | Office of Academics Magnet Office | $20,000 (through September 30, 2023) | MSAP Magnet Grant Funds and General Fund (through September 30, 2023) | Each Magnet School will determine the PD needed to enhance and sustain their magnet theme. |

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# PERFORMANCE GOAL AREA (3): *Teacher Administrator Quality*

**PERFORMANCE GOAL:**
*Per SBE Regulation 43-261, measurable performance goals, written in five-year increments, shall be developed to address the major areas of discrepancy found in the needs assessment in key areas reported in the district and school report cards.*

SMART goal must include:
WHO will do WHAT, as measured by HOW and WHEN.

We will recruit, retain, and develop a highly effective, diverse staff as measured by:

- the annual teacher retention rate increasing from 90.24% to 91.3%
- the percentage of teachers who are satisfied with current working conditions increasing from 90.95% to 92% on the annual State Department of Education Survey
- the percentage of teachers who agree that there are relevant professional development opportunities offered at their school increasing from 92.23% to 93% on the annual State Department of Education Survey.

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**INTERIM PERFORMANCE GOAL: Meet annual targets below.**

**DATA SOURCE(s): South Carolina School Report Card; Annual State Department of Education Report Card Opinion Survey**

| | Average Baseline | | 2022–23 | 2023–24 | 2024-25 | 2025-26 | 2026-27 |
|---|---|---|---|---|---|---|---|
| Teacher Retention Rate | 90.24% (2015-16 to 2018-19) | Projected Data | 90.45% | 90.66% | 90.88% | 91.09% | 91.30% |
| | | Actual Data | | | | | |
| SCDE Survey - Percentage of teachers who are satisfied with current working conditions | 90.95% (2015-16 to 2018-19) | Projected Data | 91.16% | 91.37% | 91.58% | 91.79% | 92.00% |
| | | Actual Data | | | | | |
| SCDE Survey - Percentage of teachers who agree that there are relevant professional development opportunities offered at their school | 92.23% (2015-16 to 2018-19) | Projected Data | 92.38% | 92.54% | 92.69% | 92.85% | 93.00% |
| | | Actual Data | | | | | |

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| Teacher Administrator Quality Strategy 1: |
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| We will provide an equitable learning environment which ensures the development of all students by **retaining a highly effective faculty and staff.** |

**ACTION PLAN FOR STRATEGY 1:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will monitor teacher retention and attrition to:<br>a. identify factors contributing to teacher attrition and then implement targeted responses;<br>b. look for changes in teacher retention over time; and<br>c. update stakeholders periodically on trends at the classroom, school, and system levels. | Annually in December and June 2022-2027 | Director of Personnel<br><br>Coordinator of Personnel<br><br>Chief Human Resources Officer | $0 | n/a | At least two updates provided to stakeholders each year. |
| 2. We will offer teachers an opportunity to transfer within the district through the district transfer process. | January of each year, 2022-2027 | Coordinator of Personnel | $0 | n/a | 100% of employees will be offered the opportunity to to be considered for a transfer. |
| 3. We will provide professional Development to principals on the topic of staff retention. | January, Annually, 2022-2027 | Director of Personnel | $0 | n/a | Professional Development will be offered to Principals each year on an ongoing basis. |

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| 4. We will conduct a salary study to ensure fair compensation to all staff. | September-December 2022 | Chief Human Resources Officer | $78,500 | General Fund | 100% of employees will be offered the opportunity to participate in the Salary Study |

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| Teacher Administrator Quality Strategy 2: |
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| We will improve our ability to offer diverse and equitable learning environments by **retaining and sustaining faculty, staff, and administrators who come from populations that are traditionally underrepresented in our classrooms and schools.** |

**ACTION PLAN FOR STRATEGY 2:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will use exit interview data from faculty, staff, and administrators who come from populations that are traditionally underrepresented in our classrooms and schools to uncover causes of turnover and inform targeted strategies to improve employee retention. | Ongoing, 2022-2027 | Director of Personnel<br><br>Coordinator or Personnel<br><br>Chief Human Resources Officer | $0 | n/a | 100% of employees who resign from their positions will be invited to complete an exit interview with a representative from the Office of Human Resources. The Office of Human Resources will evaluate all data to create targeted strategies. |
| 2. We will offer a New Educator Retention Incentive (NERI) for educators with up to two years of prior teaching experience. These educators will be offered a $2500 supplemental bonus for up to three years paid as a direct payment to the employee or paid directly to their qualifying student education loan. | July, annual, 2022-2027 | Office of Human Resources<br><br>Office of Finance<br><br>Superintendent | $500,000 per year | General Funds | The percentage of educators who come from populations that are traditionally underrepresented in our classrooms and schools retained through years 2 and 3 of the NERI program (baseline to be |

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| | | | | | collected in 2021-22). |
| 3. We will be intentional with the selection of faculty, staff, and administrators who come from populations that are traditionally underrepresented in our classrooms and schools to participate in opportunities for professional growth (e.g., APEC, CREATE, Carolina-TIP, Teacher PREP). | July, annual, 2022-2027 | Office of Human Resources<br><br>Office of Special Services<br><br>Office of Instruction | $120,000 per year | General Funds<br>Title II Grant | The percentage of educators who come from populations that are traditionally underrepresented in our classrooms and schools selected to participate in opportunities for professional growth. (baseline to be collected in 2021-22). |

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| Teacher Administrator Quality Strategy 3: |
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| We will provide an equitable learning environment which ensures the development of all students by **recruiting a highly effective faculty and staff.** |

**ACTION PLAN FOR STRATEGY 3:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will offer a yearly district recruitment event for all schools and offices. | January-February, annually, 2022-2027 | Coordinator of Personnel | $2,000 | ADEPT Funds | We will have 100% school participation. |
| 2. We will assist all schools with hosting an open house for teacher candidates. | January-March, annually, 2022-2027 | Coordinator of Personnel | $500 | General Fund | The District will have 100% of the schools host an open house for teacher candidates. |
| 3.We will offer on site or virtual small group meetings to applicants to inform about opportunities within the district and answer questions regarding application and interview process. | January-March, annually, 2021-2027 | Coordinator of Personnel | $1,000 | ADEPT Funds | The District will offer at least five small group meetings. |
| 4. We will post all certified vacancies to web job posting sites (ie. k12jobspot.com, Monster, CERRA) | August-July, weekly, 2021-2027 | Coordinator of Personnel | $500 | ADEPT Funds | The District will post positions to at least two different online sites. |
| 5. We will maintain job postings on the district website. | August-July Weekly, 2021-2027 | Coordinator of Personnel | $200 | ADEPT Funds | The District will ensure 100% of jobs are posted to the District Website. |

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| 6. We will promote District opportunities through college/university recruitment events and publications | Annually, dates determined by colleges/ universities, 2021-2027 | Coordinator of Personnel | $1,000 | ADEPT Funds | We will participate in five college/university events. |

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| Teacher Administrator Quality Strategy 4: |
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| We will improve our ability to offer diverse and equitable learning environments by **recruiting faculty, staff, and administrators who are representative of the students and communities we serve.** |

**ACTION PLAN FOR STRATEGY 4:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will partner with programs with an intentional focus on minority candidates to introduce candidates to opportunities in District Five. | Fall, Annually, 2023-2027 | Coordinator of Personnel, Director of Personnel | $5,000 | ADEPT Funds | The District will partner with one or more programs. |
| 2. We will advertise alternative certification opportunities to support employees. | Quarterly, 2022-2027 | Coordinator of Personnel | $200 | ADEPT Funds | The District will advertise at least four opportunities. |
| 3. We will work with the High Schools to offer information to increase interest in the education field. . | February, Annually, 2021-2027 | Coordinator of Personnel | $100 | ADEPT Funds | The District will create an informational flyer to distribute to high school juniors. |
| 4. We will offer professional development to principals on interview protocols that assist with diverse recruitment. | January, Annually, 2021-2027 | Coordinator of Personnel | $100 | ADEPT Funds | The District will offer ongoing professional development to 100% of Principals. |
| 5. We will offer individual assistance to candidates who have not passed necessary certification exams. | August - July, Quarterly 2021-2027 | Coordinator of Personnel | $200 | ADEPT Funds | The District will ensure 100% of current employees who have not |

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| | | | | | passed needed exams receive assistance. |

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| Teacher Administrator Quality Strategy 5: |
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| We will improve our ability to offer a learning environment which ensures the development of all students by **providing ongoing support to teacher candidates entering the profession through alternative certification programs.** |

**ACTION PLAN FOR STRATEGY 5:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will recruit teachers who have been certified through alternative routes to become certified mentors. | January-June, annually, 2022-2027 | Coordinator of Personnel<br>School Principals | $1,200 per year for summer training sessions | ADEPT Funds | The number of certified mentors initially certified through alternative programs will increase by two each year. |
| 2. We will assign an alternatively certified teacher mentor to incoming alternatively certified teachers to serve as a mentor for three years. | July, annually, 2022-2027 | Coordinator of Personnel<br>School Principals | $0 | n/a | 100% of alternatively certified teachers will be assigned a certified mentor for their first three years of employment. |
| 3. We will utilize a district buy-in option through Carolina TIP to offer TIP program to all alternatively certified teachers. | August, annually, 2022-2027 | Coordinator of Personnel | $5,000 per teacher | Title II Funds | 100% of newly employed alternatively employed certified teachers will be offered the opportunity to work with Carolina TIP. |
| 4. We will offer leadership opportunities to alternatively certified teachers in year three of alternate certificate (ie: LeadD5 facilitator training, SCTS 4.0 Evaluator | June, annually, 2023-2027 | Coordinator of Personnel<br><br>School | $200 per teacher (LEAD5)<br>SCTS 4.0- No | General Fund | 100% of alternatively certified teachers will be offered a leadership opportunity in year three |

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| training). | | Principals<br><br>Coordinator of Professional Development | Cost | | of alternative certification. |
| 5. We will identify an alternatively prepared teacher to lead an affinity group for new alternatively certified teachers. | September, annually, 2023-2027 | Coordinator of Personnel<br><br>School Principals | $500 per year | ADEPT Funds | One group will be coordinated for each year for alternatively certified teachers. |

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| Teacher Administrator Quality Strategy 6: |
|---|
| We will provide an equitable learning environment which ensures the development of all students by **continuing and expanding our professional development programs with an emphasis on choice offerings for faculty and staff.** |

**ACTION PLAN FOR STRATEGY 6:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will utilize a district application and training system to attract and train teachers to lead professional development in a variety of areas. | May-June, annually, 2021-2027 | Coordinator of Professional Development | $68,250 | Title II | Summer training for #LeaD5 facilitators. Participant surveys will indicate 80% of participants are satisfied or highly satisfied with PD received. |
| 2. We will offer a choice of 65 sessions during #LeaD5 professional development three times per year on district professional development days. | August, October, February, annually, 2021-2027 | Coordinator of Professional Development | $5,000 | Title II | Participant surveys will indicate 80% of participants are satisfied or highly satisfied with PD received. |
| 3. We will offer graduate courses in instructional technology through partner universities. | Semester courses beginning each September, January, and July, annually, 2021-2027 | Coordinator of Instructional Technology | $6,000/course | Title II | Course completion certificates will indicate that at least 20 staff members take a graduate course each semester. |

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| 4. We will offer non-certified staff members 25 or more choice PD sessions throughout the school year and during #LeaD5 professional development days. | August, October, February, annually, 2021-2027 | Coordinator of Professional Development | $1500 | Title II and Title IV | Participant surveys will indicate 80% of participants are satisfied or highly satisfied with PD received. |
| 5. We will offer Summer Professional Development for teachers and administrators on a variety of topics. | June - July, annually, 2021-2027 | Coordinator of Professional Development | $10,000 | Title II and Title IV | Participant surveys will indicate 80% of participants are satisfied or highly satisfied with PD received. |
| 6. We will provide outside professional development conferences for teachers choosing to lead in-district professional development. | As scheduled according to outside organizations, 2021-2027 | Coordinator of Professional Development | $45,000 | Title II | Course completion certificates; Participant surveys will indicate 80% of participants are satisfied or highly satisfied with PD received. |
| 7. We will provide Advanced Placement (AP) summer institute training for teachers interested in becoming AP endorsed in order to teach AP courses. | June - July, annually, 2021-2027 | Coordinator of Professional Development | $30,000 | Title II and Title IV | Participant completion data indicating that teachers are AP Endorsed. Participant surveys will indicate 80% of participants are satisfied or highly satisfied with PD received. |
| 8. We will offer graduate courses to address gifted and talented instructional needs and teacher endorsements. | Semester course beginning each | Coordinator of Professional Development | $5800 per course | Title II and Title IV | Course completion certificates will indicate that at least 20 staff |

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| | September, January and July, annually, 2021-2027 | | | | members take a graduate course each semester. |
| 9. We will offer graduate courses to examine the culture of poverty and its impact on children. | Semester course beginning each September, January and July, annually, 2021-2027 | Coordinator of Professional Development | $5500 per course | Title II and Title IV | Course completion certificates will indicate that at least 20 staff members take a graduate course each semester. |

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# PERFORMANCE GOAL AREA (4): *Gifted and Talented*

**PERFORMANCE GOAL:**
*Per SBE Regulation 43-261, measurable performance goals, written in five-year increments, shall be developed to address the major areas of discrepancy found in the needs assessment in key areas reported in the district and school report cards.*

SMART goal must include:
WHO will do WHAT, as measured by HOW and WHEN.

We will provide **challenging curricula focused on the academic development of students in gifted programs** and provide equitable opportunities for participation in gifted programs as measured by:

- students in grades 2-8 in the Initial Achievement Band of 90th percentile or above will have a Median Student Growth Percentile of 58 or above on MAP Growth Math and 55 or above on MAP Growth Reading by 2026
- the Advanced Placement passage rate will meet or exceed 68% through 2026
- the proportion of students who are coded as Black or African American, Hispanic or Latino, or Two or More Races who participate in AGP, Honors, AP, IB, and Dual Enrollment courses will increase from 17.1% to 27.1% (grades 3-5), 35.7% to 45.7% (grades 6-8), and 49.1% to 59.1% (grades 9-12) by 2026

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**INTERIM PERFORMANCE GOAL: Meet annual targets below.**

**DATA SOURCE(s): NWEA MAP Reports, Advanced Placement reports, PowerSchool, and Tableau**

| | Average Baseline | | 2022–23 | 2023–24 | 2024-25 | 2025-26 | 2026-27 |
|---|---|---|---|---|---|---|---|
| **MAP Growth - Students in the Initial Achievement Band of 90th percentile or above - Fall to Spring - Median Student Growth Percentile - Math** | **2015-16 - 58<br>2016-17 - 61<br>2017-18 - 57<br>2018-19 - 56** | **Projected Data** | 58 | 58 | 58 | 58 | 58 |
| | | **Actual Data** | | | | | |
| **MAP Growth - Students in the Initial Achievement Band of 90th percentile or above - Fall to Spring - Median Student Growth Percentile - Reading** | **2015-16 - 56<br>2016-17 - 55<br>2017-18 - 54<br>2018-19 - 50** | **Projected Data** | 55 | 55 | 55 | 55 | 55 |
| | | **Actual Data** | | | | | |

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| **Advanced Placement passage rate** | **68.3% (2015-16 to 2019-20)** | **Projected Data** | 68% | 68% | 68% | 68% | 68% |
| | | **Actual Data** | | | | | |
| **Proportion of students who are coded as Black or African American, Hispanic or Latino, or Two or More Races who participate in AGP, Honors, AP, IB, and Dual Enrollment courses** | **Grades 3-5 17.1% (2015-16 to 2019-20)**<br><br>**Grades 6-8 35.7% (2015-16 to 2019-20)**<br><br>**Grades 9-12 49.1% (2015-16 to 2019-20)** | **Projected Data** | Grades 3-5 - 19.10%<br><br>Grades 6-8 - 37.70%<br><br>Grades 9-12 51.10% | Grades 3-5 - 21.10%<br><br>Grades 6-8 - 39.70%<br><br>Grades 9-12 - 53.10% | Grades 3-5 - 23.10%<br><br>Grades 6-8 - 41.70%<br><br>Grades 9-12 55.10% | Grades 3-5 - 25.10%<br><br>Grades 6-8 - 43.70%<br><br>Grades 9-12 57.10% | Grades 3-5 - 27.1%<br><br>Grades 6-8 - 45.7%<br><br>Grades 9-12 - 59.1% |
| | | **Actual Data** | | | | | |

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| Gifted and Talented Strategy 1: |
|---|
| We will **provide a challenging and accelerated curriculum** to gifted and talented students in order to ensure their academic development. |

**ACTION PLAN FOR STRATEGY 1:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. Using the district ELA instructional units as a guide, we will create extension activities to supplement units for gifted learners. | September 2021 - May 2022<br><br>June 2023 - July 2027 | AGP Lead ELA teacher<br>Coordinator of Gifted and Talented | $3,500 | Title II | Supplemental extension activities added to all ELA Instructional units grades 3-5. |
| 2. We will create two additional instructional units per grade level for gifted learners in grades 3 - 5 using purchased Vanderbilt texts. | June 2021 - May 2022<br><br>June 2023 - July 2027 | AGP Lead ELA teacher<br>Coordinator of Gifted and Talented | $1,500 | Title II | We will create two supplemental units per grade level. |
| 3. We will create a new AGP math pacing guide aligned to the new textbooks to accelerate elementary math curriculum. | June 2021 - Dec. 2022 | AGP Lead Math teacher<br>Math Coordinator of Gifted and Talented | $4,000 | General Fund | Pacing guide will be created by December 2022. The district will lead instruction in implementation of curriculum units January 2023 - June 2024. The district will implement |

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| | | | | | new curriculum units for the 2024 - 2025 school year. |
| 4. We will implement new middle school math courses that will allow for multiple honors pathways for accelerated math students. | January 2021 - August 2022 | Math Coordinator<br>GT Coordinator<br>Math Leadership team | $5,000 | General Fund | New math courses will be created and in place at the middle school level beginning with the 2022-2023 school year. |

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| Gifted and Talented Strategy 2: |
| --- |
| We will ensure an equitable learning environment and the academic development of all students by **improving support to students who are taking AGP, Honors, AP, IB, or Dual Enrollment courses for the first time.** |

**ACTION PLAN FOR STRATEGY 2:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
| --- | --- | --- | --- | --- | --- |
| 1. We will provide professional development to teachers on high effect size teaching strategies to improve student achievement and support. | August 2021 - June 2023<br><br>August 2023-July 2027 | Coordinator of GT & Professional Development | $12,000 per year | Title II and Title IV | Participant Survey after PD will indicate 80% satisfied or highly satisfied with support received. |
| 2. We will utilize ongoing data from students to ensure that appropriate differentiation is provided in all AGP, Honors, AP, IB, or Dual Enrollment courses. | December and May, 2021-2027 | Coordinator of Gifted and Talented APIs | $0 | n/a | Students in grades 2-8 in the Initial Achievement Band of 90th percentile or above will have a Fall to Winter and Fall to Spring Median Student Growth Percentile of 58 or above on MAP Growth Math and 55 or above on MAP Growth Reading by 2026.<br><br>Students in grades 9-12 wil have an AP passage rate of 68% or above. |

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| 3. We will provide professional development on small-group instruction in order to improve student achievement. | August 2021 - June 2023 | Coordinator of GT & Professional Development | $6,500 | Title II | Participant Survey after PD will indicate 80% satisfied or highly satisfied with support received. |
| 4. We will provide professional development support for implementing systems of in-class peer tutoring. | August 2021 - June 2023 | Coordinator of GT & Professional Development | $5,000 | Title IV | Participant Survey after PD will indicate 80% satisfied or highly satisfied with support received. |

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| Gifted and Talented Strategy 3: |
|---|
| We will improve our ability to provide a learning environment which ensures the development of all students by **providing professional development opportunities on the needs of gifted learners to all teachers.** |

**ACTION PLAN FOR STRATEGY 3:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will provide Gifted and Talented Endorsement courses for all teachers who wish to pursue endorsement. | Sept - Dec January - May June - July, annually 2021-2027 | Coordinator of Gifted and Talented | $5,500 per semester | Title II and Title IV funding | Completion of a GT endorsement course by at least 20 teachers per semester. |
| 2. We will provide a Gifted and Talented graduate course for counselors. | January - May, 2023 | Coordinator of Gifted and Talented | $5,500 per course | Title II and IV funding | Completion of a GT graduate course by at least ten school counselors by May 2023. |
| 3. Each Spring, we will provide one Gifted and Talented graduate course beyond basic endorsement for all teachers who wish to pursue coursework beyond the basic endorsement. | Spring 2023, 2024, 2025 | Coordinator of Gifted and Talented | $5,500 per course | Title II and IV funding | Completion of a GT graduate course by at least fifteen GT endorsed teachers per semester. |
| 4. We will utilize Leadership Meetings to provide professional development about the needs of gifted and talented learners. | September, December, May 2021-2022 | Coordinator of Gifted and Talented | $0 | n/a | Leadership rosters Participant Survey after PD will indicate 80% satisfied or highly |

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| | | | | | satisfied with PD received. |
| 5. We will provide professional development during district professional development days each year about the academic needs of gifted and talented learners. | August, October, March 2021-2022 | Coordinator of Gifted and Talented | $0 | n/a | Participant Survey after PD will indicate 80% satisfied or highly satisfied with PD received. |
| 6. We will provide professional development during district professional development days each year about the social and emotional needs of gifted and talented learners. | August, October, March 2021-2022 | Coordinator of Gifted and Talented | $0 | n/a | Participant Survey after PD will indicate 80% satisfied or highly satisfied with PD received. |
| 7. We will provide professional development for up to five teachers per year at the SC Gifted Consortium one day annual conference. | December 2021 | Coordinator of Gifted and Talented | $500 | Title II | Attendance reports indicating completion of one-day professional development by five teachers per year. |

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| Gifted and Talented Strategy 4: |
|---|
| We will improve our ability to provide a learning environment which ensures the development of all students by **providing opportunities for collaboration between teachers at different schools.** |

**ACTION PLAN FOR STRATEGY 4:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will utilize Leadership Meetings to provide collaborative time between teachers of gifted students from different schools. | October, November, January, Feb, March 2021-2022 | Coordinator of Gifted and Talented | $0 | n/a | Leadership meeting rosters; Participant Survey at the end of each semester will indicate 80% satisfied or highly satisfied with leadership meetings received. |
| 2. We will create a collaborative document linked to AGP Unit plans for teachers to provide feedback and ideas. | January 2022 - January 2023 June 2023-July 2027 | Coordinator of Gifted and Talented | $0 | n/a | Collaborative document created and used by at least 50% of AGP teachers. |
| 3. We will create additional unit plan extensions for existing AGP ELA Unit plans. | June - July 2022 June 2023-July 2027 | Coordinator of Gifted and Talented AGP Leads | $4,500 | Title Ii and IV | Unit plan extensions created for all AGP units by July 2022. Implementation of extensions by all AGP teachers by May 2024. |
| 4. We will create additional unit plan | June - July | Coordinator of | $4,500 | Title IV | Unit plan extensions |

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| extensions for existing AGP Math Unit plans. | 2022 | Gifted and Talented | | | created for all AGP units by July 2022. Implementation of extensions by all AGP teachers by May 2024. |
| 5. We will provide a digital space for displays of student work and planning ideas for GT teachers. | January 2022 - January 2023 | Coordinator of Gifted and Talented | $0 | n/a | Digital space established and utilized by at least 50% of teachers. |

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| Gifted and Talented Strategy 5: |
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| We will improve our ability to provide an equitable learning environment which ensures the development of all students by **using district criteria for local identification to place academically talented students in AGP courses.** |

**ACTION PLAN FOR STRATEGY 5:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will maintain records and monitor placement of AGP students placed according to local identification criteria. | August and January, annually, 2021-2027 | Gifted and Talented Coordinator<br><br>School Principals or Assistant Principals for Instruction | $0 | n/a | 100% of schools will maintain documentation of placement as well as the placement criteria used for all locally identified students |
| 2. We will review the local identification policy each year to review established criteria and adjust according to need. | April - May, annually, 2021-2027 | Gifted and Talented Coordinator | $0 | n/a | The local criteria policy will be updated annually. |
| 3. We will work with individual schools to establish school-based criteria for schools with fewer than 15 identified students per grade level. | April - June, annually, 2021-2027 | Gifted and Talented Coordinator School Assistant principals for instruction | $0 | n/a | All schools will serve at least 15 students per grade level. |

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| 4. We will evaluate the success of locally identified gifted and talented students according to MAP data. | September, December, April, annually, 2021-2027 | Gifted and Talented Coordinator | $0 | n/a | Students in grades 2-5 in the Initial Achievement Band of 90th percentile or above will have a Fall to Winter and Fall to Spring Median Student Growth Percentile of 58 or above on MAP Growth Math and 55 or above on MAP Growth Reading by 2027. |

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| Gifted and Talented Strategy 6: |
|---|
| We will improve our ability to provide an equitable learning environment which ensures the development of all students by **providing parent education about academic opportunities and supports needed for high achieving students.** |

**ACTION PLAN FOR STRATEGY 6:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will provide a parent information meeting to welcome parents of newly identified gifted and talented students in order to explain opportunities available in District Five. | September, annually, 2021-2027 | Coordinator of Gifted and Talented<br><br>Page 5 Advocacy Group | $0 | n/a | Meeting agenda. Parent Survey after the welcome meeting will indicate 80% satisfied or highly satisfied with information received. |
| 2. We will provide a parent information meeting for locally identified gifted and talented students to discuss supports and pathways in gifted education. | September, annually, 2021-2027 | Coordinator of Gifted and Talented<br><br>Elementary School Admin/AGP Teachers | $0 | n/a | Meeting agenda. Parent Survey after the meeting will indicate 80% satisfied or highly satisfied with information received. |
| 3. We will coordinate with middle schools to offer a parent information night about honors courses available at the middle school level. | February, annually, 2021-2027 | Coordinator of Gifted and Talented Middle School AGP Lead | $0 | n/a | Meeting agenda. Parent Survey after the welcome meeting will indicate 80% satisfied or highly satisfied with |

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| | | teacher/API/Counselor | | | information received. |
| 4. We will provide a parent information meeting about the benefits of advanced coursework in high school. | February, annually, 2021-2027 | Coordinator of Gifted and Talented<br><br>HS Admin/API/Counselor | $0 | n/a | Meeting agenda.<br>Parent Survey after the welcome meeting will indicate 80% satisfied or highly satisfied with information received. |
| 5. We will coordinate with high school magnet programs to offer an information session about advanced offerings through magnet opportunities | March, annually, 2021-2027 | Coordinator of Gifted and Talented<br><br>Director of Magnet Programs | $0 | n/a | Meeting agenda.<br>Parent Survey after the welcome meeting will indicate 80% satisfied or highly satisfied with information received. |
| 6. We will partner with gifted and talented parent groups to provide a roundtable parent meeting about social emotional needs of gifted and talented students. | April, annually, 2021-2027 | Coordinator of Gifted and Talented<br><br>Page 5 Advocacy Group | $0 | n/a | Meeting agenda.<br>Parent Survey after the welcome meeting will indicate 80% satisfied or highly satisfied with information received. |

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| Gifted and Talented Strategy 7: |
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| We will improve our ability to provide an equitable learning environment which ensures the development of all students by **increasing communication regarding opportunities for students and the importance of taking AGP, Honors, AP, IB, and Dual Enrollment courses.** |

**ACTION PLAN FOR STRATEGY 7:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will communicate opportunities each month to school counselors for inclusion in school newsletters or parent information. | September - May, Monthly, 2021-2027 | Coordinator of Gifted and Talented | $0 | n/a | 100% of schools will include updates in their school newsletters. |
| 2. We will coordinate with middle school AGP lead teachers regarding PSAT opportunities | September, annually, 2021-2027 | Coordinator of Gifted and Talented | $0 | n/a | Emails to AGP Lead Teachers.<br>PSAT test taker data indicating that at least 20% of 8th graders take the PSAT. |
| 3. We will coordinate with middle school AGP lead teachers regarding junior scholar opportunities | December, annually, 2021-2027 | Coordinator of Gifted and Talented | $0 | n/a | Emails to AGP Lead Teachers.<br>Junior Scholar data indicating at least 85 Junior Scholars each year. |
| 4. We will publish AP scholar data and will encourage increased participation | July, annually, 2021-2027 | Coordinator of Gifted and | $0 | n/a | Communications publications. AP Scholar |

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| through this communication. | | Talented<br><br>District Testing Coordinator & AP Testing Coordinators at HS | | | data indicating that at least 200 high school students are named AP scholars each year. |
| 5. We will work with high school PSAT/SAT coaches in order to increase participation in PSAT and SAT competition. | January, annually, 2021-2027 | Coordinator of Gifted and Talented<br><br>Testing Coordinators | $0 | n/a | 9th and 11th grade PSAT participation data indicating at least 20% of honors freshmen and at least 30% of honors juniors take the PSAT. |
| 6. We will work with Assistant Principals for Instruction at Directors of School Counseling at the high school level to review Advanced Placement Potential data and ensure that counselors actively recruit students. | December, annually, 2021-2027 | Coordinator of Gifted and Talented<br><br>AP/Testing Coordinator/Counselors | $0 | n/a | AP Potential Report Data regarding AP student participation that indicates that at least 50% of identified students take at least one AP course. |

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| Gifted and Talented Strategy 8: |
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| We will improve our ability to provide an equitable learning environment which ensures the development of all students by **providing access to experiential learning opportunities for all students in order to improve student engagement.** |

**ACTION PLAN FOR STRATEGY 8:**

| ACTIVITY | TIMELINE (Start and End Dates) | PERSON(S) RESPONSIBLE | ESTIMATED COST | FUNDING SOURCE | EVALUATION: INDICATORS OF IMPLEMENTATION |
|---|---|---|---|---|---|
| 1. We will provide professional development for teachers on project-based learning and other high effect size teaching strategies for experiential learning. | August 2021 - June 2023, graduate course, 2021-2027 | Coordinator of Gifted and Talented | $3,800 per course | Title II and Title IV | Participant Survey after PD will indicate 80% satisfied or highly satisfied with PD received. |
| 2. We will provide professional development mini-sessions during school-level professional development time about experiential learning. | August 2021 - June 2023, as scheduled by schools, 2021-2027 | Coordinator of Gifted and Talented | $0 | n/a | Participant Survey after PD will indicate 80% satisfied or highly satisfied with PD received. |
| 3. We will utilize professional learning communities for teacher collaboration in order to offer more hands-on learning planning time. | Bi-weekly PLC time, 2021-2027<br><br>Monthly District PLCs 22-27 | Coordinator of Gifted and Talented | $0 | n/a | Addition of 2 activities created in PLC planning time to the AGP units. |
| 4. We will add experiential learning activities to each district AGP ELA unit. | January 2022 - June 2023, 2021-2027 | Coordinator of Gifted and Talented | $2,500 Curriculum Materials | General Fund | Addition of 2 activities created in PLC planning time to the AGP units. |

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| 5. We will add experiential learning activities to each district AGP Math unit. | January 2022 - June 2023, 2021-2027 | Coordinator of Gifted and Talented | $2,500 Curriculum Materials | General Fund | Addition of 2 activities created in PLC planning time to the AGP units. |

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