# **Template of Preliminary Plan for Consolidation, Timeline, and Application for Proviso 1.88(A) Funding**

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## Introduction

The South Carolina Department of Education (SCDE) provides this document as an optional template for districts pursuing consolidation pursuant to 2019-20 Proviso 1.88(A). Districts are welcome to use this template or to provide their own format for preliminary plans, timelines, and applications for funding. The proviso in question reads as follows:

**1.88.** (SDE: School Districts Capital Improvement) The funds appropriated for school district capital improvements in Proviso 112.1, shall be prioritizedby the Department of Education pursuant to subsections (A) and (B).

(A) Twenty-five percent of the funds shall be made available first to a local school district or districts with an average daily membership that is less than one thousand five hundred, based on the most recent student count received by the department, and that is located within a county ranked as Tier IV pursuant to Section 12-6-3360(B) for 2018 which chooses to consolidate with another school district located in the same county. The funds may be used to support costs directly related to the consolidation which shall include, but are not limited to, salary adjustments, facilities, debt mitigation, millage rate adjustments, transportation, technology and other factors for which the district demonstrates are necessary to complete consolidation. Furthermore, the department is eligible to carry forward these funds and use them for the same purpose. On or before August 1, the eligible districts must submit a preliminary plan and timeline for pursuing consolidation, including the use of the consolidation funds requested, to the Department of Education for review and approval. When the department has approved the final plan, the districts shall forward the plan to the local legislative delegation outlining the specific request that local legislation be enacted to effect the consolidation. The legislation may include, but is not limited to, composition of the consolidated board, transition procedures, and disposition and/or assumption of district assets and liabilities. Upon approval of a consolidation plan, the department shall make an initial allocation to the impacted districts and shall allocate remaining funds upon enactment of legislation formally consolidating the districts for the benefit of the consolidated district.

The legislature appropriated $50 million in one-time funding for proviso 1.88, of which $12.5 million is allocated to consolidation under section 1.88(A). Participation by eligible districts is voluntary and for those who choose to consolidate. A district will only receive a full allocation of approved funding if local legislation is enacted causing consolidation. This funding is not tied to other proposed (but not yet enacted) legislation and is not contingent on mandatory consolidation.

The SCDE has identified the following districts as eligible under this proviso:

| District | ADM 2018-19 45th day | ADM 2018-19 135th day | 2018 County Tier | [2019 County Tier](https://www.sccommerce.com/sites/default/files/jtc_2019_map.pdf) | Schools | 2019 ITA | District Poverty Index |
| --- | --- | --- | --- | --- | --- | --- | --- |
| BAMBERG 1 | 1,259.35 | 1,256.76 | 4 | 4 | 3 | 0.0008 | 78.54 |
| BAMBERG 2 | 646.14 | 638.25 | 4 | 4 | 3 | 0.0006 | 92.56 |
| BARNWELL 19 | 582.12 | 587.14 | 4 | 4 | 2 | 0.00047 | 91.52 |
| BARNWELL 29 | 822.98 | 822.79 | 4 | 4 | 3 | 0.00065 | 76.39 |
| CLARENDON 1 | 711.98 | 710.4 | 4 | 4 | 3 | 0.00133 | 92.11 |
| CLARENDON 3 | 1,250.60 | 1,253.34 | 4 | 4 | 2 | 0.0004 | 63.23 |
| HAMPTON 2 | 655.59 | 662.1 | 4 | 3 | 3 | 0.00068 | 91.45 |

Although it otherwise meets the criteria, the SCDE has determined that Allendale is not eligible because there are no other districts in that county.

Although these districts do not meet the criteria, the SCDE has determined that funds from proviso 1.88(A) could be used by eligible districts to consolidate with the following districts:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| District | ADM 2018-19 45th day | ADM 2018-19 135th day | 2018 County Tier | [2019 County Tier](https://www.sccommerce.com/sites/default/files/jtc_2019_map.pdf) | Schools | 2019 ITA | District Poverty Index |
| BARNWELL 45 | 2,130.39 | 2,117.32 | 4 | 4 | 4 | 0.00146 | 76.04 |
| CLARENDON 2 | 2,752.99 | 2,753.54 | 4 | 4 | 4 | 0.00234 | 86.43 |
| HAMPTON 1 | 2,097.56 | 2,087.65 | 4 | 3 | 5 | 0.00165 | 78.47 |

## Proviso Timelines

| **Timeline** | **Description** |
| --- | --- |
| June 2019 | SCDE issues template and guidance related to proviso. |
| July 1, 2019 | Budget provisos for fiscal year 2019-20 go into effect. |
| July 2019 | SCDE hosts consolidation workshop for consolidating districts |
| August 1, 2019 | Due date for districts to submit preliminary plans, timelines, and applications. |
| August 2019 | SCDE reviews preliminary plans and provides districts with feedback. |
| Fall 2019 | Districts submit final plans for SCDE review. |
| Fall 2019 | SCDE review and approval of final consolidation plans.   * Upon approval the district forwards the final plan to the local delegation with a specific request for legislation. * SCDE makes an initial allocation of funds under the proviso |
| January 2020 | Legislature returns and is in session |
| Upon enactment | Upon enactment of legislation formally consolidating the districts, the SCDE shall release the remaining funds. |

## Template

### Identifying Information

| **Item** | **Description** |
| --- | --- |
| District 1: |  |
| Main Application Contact: |  |
| Contact’s Email: |  |
| Superintendent: |  |
| Board Chair: |  |
| Accountability-Testing Officer: |  |
| ADEPT Coordinator: |  |
| CFO/Business Official: |  |
| Chief Academic Officer: |  |
| CTE Director: |  |
| Federal Program Official(s)[[1]](#footnote-1): |  |
| Food Service Director: |  |
| Personnel/HR Director: |  |
| Technology Director: |  |
| Legal Representation: |  |
| Audit Firm: |  |
|  |  |
| District 2: |  |
| Main Application Contact: |  |
| Contact’s Email: |  |
| Superintendent: |  |
| Board Chair: |  |
| Accountability-Testing Officer: |  |
| ADEPT Coordinator: |  |
| CFO/Business Official: |  |
| Chief Academic Officer: |  |
| CTE Director: |  |
| Federal Program Official(s): |  |
| Food Service Director: |  |
| Personnel/HR Director: |  |
| Technology Director: |  |
| Legal Representation: |  |
| Audit Firm: |  |
|  |  |
| District 3 (if any): |  |
| Main Application Contact: |  |
| Contact’s Email: |  |
| Superintendent: |  |
| Board Chair: |  |
| Accountability-Testing Officer: |  |
| ADEPT Coordinator: |  |
| CFO/Business Official: |  |
| Chief Academic Officer: |  |
| CTE Director: |  |
| Federal Program Official(s): |  |
| Food Service Director: |  |
| Personnel/HR Director: |  |
| Technology Director: |  |
| Legal Representation: |  |
| Audit Firm: |  |

### Timeline for Consolidation

Please indicate the school year by which the districts an anticipate completion of consolidation (pick one, please)

:

\_ School Year/Fiscal Year 2020-21

\_ School Year/Fiscal Year 2021-22

\_ School Year/Fiscal Year 2022-23

### Certification

The chair of the local board of trustees and the superintendent for the districts listed in this application certify that the districts choose to consolidate, and – if approved – will utilize funds allocated according to the final plan to pursue and complete the consolidation.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| District |  | Superintendent |  | Board Chair |  | Date |
|  |  |  |  |  |  |  |
| District |  | Superintendent |  | Board Chair |  | Date |
|  |  |  |  |  |  |  |
| District |  | Superintendent |  | Board Chair |  | Date |

### Vision for Students

Directions: In this section, please describe the districts’ vision for how consolidation will improve the educational outcomes for students. Examples might include increased educational opportunities, improved quality of services, or decreased administrative expense that can be redirected to educational programs. Please provide the preliminary plans, timelines, and needs for addressing this vision.

Some topics for consideration:

1. How will the districts handle continuity of instruction and programming during the summer of consolidation? (E.g., summer reading camps, summer schools, credit recovery, extended year)
2. What career and technology programs are currently offered by each district, and how can the combined district increase opportunities for all students?
3. Which EEDA majors are currently offered by the districts, and what opportunities will be available to students in the consolidated district?
4. What does the data from each district indicate that the instructional priorities should be?
5. Do the districts use particular curricula and what will be the instructional materials for the consolidated district?

For any analysis that is not yet complete and included in this submission, please provide the following:

1. The anticipated timeline for completion;
2. The name and contact information on the staff members responsible for completion of the tasks within that timeline.

If the districts plan to seek Proviso 1.88(A) funding in connection with this topic, please include:

1. The amount of the request;
2. The purpose for the funding;
3. The impact and alternatives if the request is not funded; and
4. The contact information of the staff responsible for that activity.

**Districts’ Responses on Item D. Vision for Students:**

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### Transition Leadership, Community Input, and Facilitation

Directions: In this section identify any staff or contractors who will be necessary to facilitate and complete the consolidation, how the districts’ anticipate funding those positions, and when the districts propose hiring-contracting with them. In addition, identify how the districts will include the communities served in discussions around consolidation, receive public input, and report out on decisions made related to consolidation. For any actions that are listed but not yet complete, please provide the following:

1. The anticipated timeline for completion;
2. The name and contact information on the staff members responsible for completion of the tasks within that timeline.

Some questions for consideration:

1. How will the local boards of trustees operate, and what will be the transition to a new board for the consolidated district?
2. Who will compare the board policies and procedures for the districts and recommend consolidated or revised policies for the consolidated district?
3. When will public meetings be held and how will they be advertised?
4. Will there be a consolidation committee or work group, and what would be its composition, charter, deadlines, and tasks?
5. Is an interim superintendent or leader necessary for the consolidated district during the transition and before its formal existence? If so, how will that position be funded, where will the person be based, and what authority will that person have?
6. Should the districts retain a facilitator to lead discussions on certain topics or to chair community meetings?

If the districts plan to seek Proviso 1.88(A) funding for any of these activities, please include:

1. The amount of the request;
2. The purpose for the funding;
3. The impact and alternatives if the request is not funded; and
4. The contact information of the staff responsible for that activity.

| **Districts’ Responses on Item E. Transition Leadership, Community Input, & Facilitation:** |
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### Personnel

Directions: In this section, please describe the districts’ preliminary plans, timelines, and needs for addressing consolidation of the human resources in the districts. Please include preliminary plans for addressing all staff including, but not limited to, classroom teachers, other certified staff, bus drivers, food service staff, and maintenance staff, on these topics at a minimum:

1. review of the districts human resources policy manuals for limitations and procedures, and proposals for alignment;
2. salary schedules among the districts and whether funds are necessary for “equalization”;
3. salary supplements that differ, and whether funds are necessary for equalization;
4. whether days assigned to positions are aligned among the districts;
5. any duplication of staff;
6. retirements and vacancies anticipated between the plan approval and final consolidation;
7. a proposed organizational chart for the consolidated district;
8. initial proposed administrative staff and budget, and analysis of whether the consolidated district will meet the 75 percent threshold in proviso 1.25 for fiscal flexibility;
9. how the consolidation of staff will improve opportunities for students or reduce overall costs; and
10. anticipated funds necessary for completion of the consolidation, and whether any of those funds are requested under Proviso 1.88(A).

For any analysis that is not yet complete and included in this submission, please provide the following:

1. The anticipated timeline for completion;
2. The name and contact information on the staff members responsible for completion of the tasks within that timeline.

| **Districts’ Responses on Item F. Personnel** |
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### Consolidated Financials & Millage

Directions: In this section please provide information on the districts’ combined revenues by source of funds, analysis of the projected combined expenditures, details of the districts’ outstanding debt and debt service, and a breakout of existing millage, future millage requirements, and any equalization issues.

For any analysis that is not yet complete and included in this submission, please provide the following:

1. The anticipated timeline for completion;
2. The name and contact information on the staff members responsible for completion of the tasks within that timeline.

If the districts plan to seek Proviso 1.88(A) funding in connection with this topic, please include:

1. The amount of the request;
2. The purpose for the funding;
3. The impact and alternatives if the request is not funded; and
4. The contact information of the staff responsible for that activity.

Some questions for consideration:

1. What will be the combined poverty percentage of the consolidated district? Does this rate impact eligibility for any existing state or federal programs (e.g., Title I, flexibility proviso, CERDEP, capital funds)?
2. Do the districts participate in the U.S. Department of Agriculture’s Community Eligibility Program (CEP)? Will the combined district’s census poverty impact CEP eligibility?
3. What debt is outstanding, with what terms and for how long?

Note: In the year of consolidation, the merging districts will need their audit firm(s) to provide audits by December 1 through the end of the prior fiscal year (June 30), and the consolidated district will need to retain an audit firm to provide the next year’s December 1 audit.

| **Districts’ Responses on Item G. Consolidate Financials & Millage** |
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### Assets, Inventory, and Contractual Obligations

Directions: In this section please provide information on the districts’ assets and inventory, as well as any contractual obligations (e.g., equipment leases, software licenses, food service contracts, special education services, technology obligations, or operations and planning contracts).

For any analysis that is not yet complete and included in this submission, please provide the following:

1. The anticipated timeline for completion;
2. The name and contact information on the staff members responsible for completion of the tasks within that timeline.

If the districts plan to seek Proviso 1.88(A) funding in connection with this topic, please include:

1. The amount of the request;
2. The purpose for the funding;
3. The impact and alternatives if the request is not funded; and
4. The contact information of the staff responsible for that activity.

Some questions for consideration:

1. Do the districts use the same financial accounting and payroll software?
2. Do the districts use the same personnel software?
3. Do the districts operate on the same school nutrition software (both brand and version)?
4. Are the districts on the same networking hardware and operating systems?
5. Do the districts have any bond debt?
6. Are any of the districts anticipating major purchases or construction in the near future? Do the districts have major procurements underway?
7. Are the districts using the same vendor(s) for services? What are the contract terms and termination dates?
8. Do any of the districts have grant obligations that would extend beyond the consolidation date?

| **Districts’ Responses on Item H. Assets, Inventory, and Contractual Obligations** |
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### Facilities

Directions: In this section please provide information on the facilities and facilities’ needs of the combined districts. Please list in priority order the items that are in the districts’ capital improvement plans for the next five years, and the current status of each such project.

For any analysis that is not yet complete and included in this submission, please provide the following:

1. The anticipated timeline for completion;
2. The name and contact information on the staff members responsible for completion of the tasks within that timeline.

If the districts plan to seek Proviso 1.88(A) funding in connection with this topic, please include:

1. The amount of the request;
2. The purpose for the funding;
3. The impact and alternatives if the request is not funded; and
4. The contact information of the staff responsible for that activity.

Note: An additional $37.5 million in funding is available for eligible districts under proviso 1.88(B) for funding certain shared school facilities construction and upgrades. The proviso states priority shall be “given to districts that submit a plan for a facility that *serves multiple school districts* with average daily membership counts of less than one thousand five hundred.” Information on applying for these funds will be available after July 1, 2019.

| **Districts’ Responses on Item I. Facilities** |
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### Attendance Zones, School Configurations, Shared Facilities, and Transportation

Directions: In this section please provide information for the combined districts on anticipated change in attendance zones for schools, planned reconfiguration of schools or school closures, plans for sharing facilities (the consolidation district sharing with other districts), and transportation needs. Some questions for consideration include:

1. Will the grade bands at each school building remain the same?
2. What opportunities does the consolidated district have for dedicating some facilities to magnet or choice programs?
3. Will the consolidated district have an open enrollment policy?
4. What are the growth projections for the consolidated district over the next ten years?
5. Based on enrollment figures and projections, how many school facilities are needed and will any schools be closed in the next five years?
6. Are students’ opportunities increased by sharing any facilities with other districts? (Note: Proviso 1.88(B) funds might be available for this purpose.)
7. Based upon these projections, what additional transportation resources might be needed?
8. Will the consolidated district have GPS routing for school buses?

For any analysis that is not yet complete and included in this submission, please provide the following:

1. The anticipated timeline for completion;
2. The name and contact information on the staff members responsible for completion of the tasks within that timeline.

If the districts plan to seek Proviso 1.88(A) funding in connection with this topic, please include:

1. The amount of the request;
2. The purpose for the funding;
3. The impact and alternatives if the request is not funded; and
4. The contact information of the staff responsible for that activity.

| **Districts’ Responses on Item J: Attendance Zones, School Configurations, Shared Facilities, and Transportation** |
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### Student Information Systems

Directions: In this section please provide information on how the districts will combine student information systems, including, but not limited to, PowerSchool or its successor, Enrich IEP, assessment data systems, food service systems, and the like.

For any analysis that is not yet complete and included in this submission, please provide the following:

1. The anticipated timeline for completion;
2. The name and contact information on the staff members responsible for completion of the tasks within that timeline.

If the districts plan to seek Proviso 1.88(A) funding in connection with this topic, please include:

1. The amount of the request;
2. The purpose for the funding;
3. The impact and alternatives if the request is not funded; and
4. The contact information of the staff responsible for that activity.

| **Districts’ Responses on Item K: Student Information Systems** |
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|  |

### Technology

Directions: In this section please provide information on the districts’ technology, including – but not limited to – network and infrastructure, information security, backup/recovery systems, status of 1:1 initiatives, status related to online testing, staffing, technology proficiency of technical and instructional staff, integration of technology in classroom instruction, and status of wireless access within buildings, especially capacity for all students to be on 1:1 devices at once.

For any analysis that is not yet complete and included in this submission, please provide the following:

1. The anticipated timeline for completion;
2. The name and contact information on the staff members responsible for completion of the tasks within that timeline.

If the districts plan to seek Proviso 1.88(A) funding in connection with this topic, please include:

1. The amount of the request;
2. The purpose for the funding;
3. The impact and alternatives if the request is not funded; and
4. The contact information of the staff responsible for that activity.

| **Districts’ Responses on Item L: Technology** |
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### Required Plans - Grant Awards

Directions: Districts are required to maintain several state and federal plans. In addition, districts have multiple fedearl grant awards (e.g., IDEA and ESSA) with plans for expenditure over multiple years. In this section please describe how the districts intend to consolidate and improve their plans, federal awards, and uses-expenditures of funds. At a minimum, please include information on the consolidated district strategic plan, Read to Succeed plan, federal Title plans, IDEA plan, ADEPT plan, and individual school renewal plans, as well as a description of how federal awards will be combined and used upon consolidation.

Some topics for discussion:

1. Ask the S.C. Department of Education to project what all federal awards will be once the districts are consolidated. Does funding increase or decrease? How will any changes in grant funding be handled?
2. What do the districts’ data show are the achievement issues in the districts? Do the plans address those issues?
3. Review the report card data files and project what the results will be for the consolidated district. What does that information indicate?

For any analysis that is not yet complete and included in this submission, please provide the following:

1. The anticipated timeline for completion;
2. The name and contact information on the staff members responsible for completion of the tasks within that timeline.

If the districts plan to seek Proviso 1.88(A) funding in connection with this topic, please include:

1. The amount of the request;
2. The purpose for the funding;
3. The impact and alternatives if the request is not funded; and
4. The contact information of the staff responsible for that activity.

| **Districts’ Responses on Item M: Required Plans** |
| --- |
|  |

### Outstanding Findings, Litigation, and Potential Liabilities

Directions: Please describe for each district any outstanding regulatory findings, audit findings, pending or anticipated litigation, and other potential liabilities that might impact consolidation.

For any analysis that is not yet complete and included in this submission, please provide the following:

1. The anticipated timeline for completion;
2. The name and contact information on the staff members responsible for completion of the tasks within that timeline.

If the districts plan to seek Proviso 1.88(A) funding in connection with this topic, please include:

1. The amount of the request;
2. The purpose for the funding;
3. The impact and alternatives if the request is not funded; and
4. The contact information of the staff responsible for that activity.

| **Districts’ Responses on Item N: Outstanding Findings, Litigation, Potential Liabilities** |
| --- |
|  |

### Other Factors Necessary for Consolidation

Directions: Please describe the districts plans for other factors determined to be necessary for consolidation.

For any analysis that is not yet complete and included in this submission, please provide the following:

1. The anticipated timeline for completion;
2. The name and contact information on the staff members responsible for completion of the tasks within that timeline.

If the districts plan to seek Proviso 1.88(A) funding in connection with this topic, please include:

1. The amount of the request;
2. The purpose for the funding;
3. The impact and alternatives if the request is not funded; and
4. The contact information of the staff responsible for that activity.

| **Districts’ Responses on Item O: Other Factors** |
| --- |
|  |

1. Title programs under ESSA, IDEA/special education, Perkins. [↑](#footnote-ref-1)