

## BOARD AGENDA ITEM

July 29, 2025

### ***SUBJECT:***

Annual Update on Minority Business Enterprise Utilization Plan

### ***BACKGROUND INFORMATION:***

The School Board approved the original Minority Business Enterprise (MBE) Utilization Plan, in accordance with the South Carolina Consolidated Procurement Code, at its July 18, 2023, meeting. That plan requires a semi-annual reporting in January and July. The plan must be updated annually for any changes no later than July 30.

### ***ADMINISTRATIVE CONSIDERATION:***

In compliance with MBE annual reporting requirements, the Administration and Procurement department provide the following:

A. Number of minority firms solicited

Total = 80

*Compared to 85 in FY 2024*

B. Number of minority bids received

Total = 1

*Compared to 3 in FY 2024*

C. Total dollar amount of funds expended on contracts awarded to minority firms certified pursuant to Section 11-35-5230 of South Carolina Code of Laws

Total = \$2,075,834

*Compared to \$3,447,393 in FY 2024*

D. Total dollar amount of funds expended, less exclusions

Total = \$33,859,494 unaudited

*Compared to \$60,170,680 (unaudited at that time) for FY 2024*

In regard to item D, school districts have the discretion to determine which expenditures to include or exclude in this analysis. After much consideration of various expenditures' attributes, exclusions were identified. The District will continue to have the ability to amend its inclusions or exclusions, as necessary, as it continues to refine its MBE Utilization Plan. The decrease in expenditures is largely attributable to the end of ESSER funding on September 30, 2024. The District made significant efforts to spend all funds by the end of FY 2024; only a small amount remained unspent going into the 2024 – 2025 school year.

The District's MBE Utilities Plan goal for 2024 – 2025 was to spend a minimum of 10% of controllable procurements with MBE firms. For the year ended June 30, 2025, this percentage finished at 6.1%. For comparison, the percentage was 5.6% as of the prior year end, June 30, 2024. The percentage was 5.8% December 31, 2024. While the District has not yet met its goal of 10%, percentages are trending in a positive direction.

The MBE Utilization Plan has been reviewed. No revisions are recommended at this time, which would maintain a goal of 10% of controllable procurements with MBE firms for 2025 – 2026.

***RECOMMENDATION:***

Accept the MBE annual reporting for information only.

***ATTACHMENT:***

1. Exclusions for Determination of the MBE percentage
2. Minority Business Report for July 1, 2024 – June 30, 2025
3. MBE Utilization Plan (no changes proposed)

***PREPARED BY:***

M. O. Traxler III  
Lori Miller

### **Exclusions for determination of the MBE percentage**

The following items are among the exclusions for determining the proportion of MBE expenditures to expenditures of the whole:

#### **Funds**

400 – Debt Service

506 – 510, 516, 517, 529, 575 - 579, 58x, 59x – Capital Funds (these are previously award construction contracts paid from 8%, \$90 million, and 1% sales tax funds)

600 – School Food Service (due to our move to a food service management contract)

7xx – Pupil Activity (7xx funds; these funds are school level funds and are not budgeted at the District level)

#### **Functions**

258 – SROs and contracted security

#### **Objects**

1xxxxx – Salaries and related items

2xxxxx – Fringe benefits and related items

311000 – Substitute teacher service

316000 – Data processing

317000 – Statistical services

318000 – Audit services

319x00 – Legal services

321000 – Water/Sewer

324000 – Property insurance

325000 – Rentals

331000 – Student transportation

332000, 380000 – Travel

339000 – Other transportation

340000 – Telephone

37x000 – Tuition due to other districts/entities

470000 – Energy

6xxxxx – Redemption of principal, interest, discounts on bonds, dues/fees

7xxxxx – Transfers, indirect costs, etc.

## ANNUAL MINORITY REPORT

VENDOR NUMBER	VENDOR NAME	1st QUARTER EXPENDITURES	2nd QUARTER EXPENDITURES	3rd QUARTER EXPENDITURES	4th QUARTER EXPENDITURES	YEAR TO DATE EXPENDITURES	TYPE OF SUPPLIES
47747	Birdy Boutique	\$1,950.00				\$1,950.00	Student Activity
33802	Caraway Fire & Safety Corporation	\$23,150.00	\$4,850.00			\$28,000.00	Maintenance Repairs & Services
40739	CC&I Services, LLC	\$14,175.00	\$15,300.00	\$9,200.00	\$21,877.50	\$60,552.50	Professional & Tech Services
36219	The Flooring Connection, LLC	\$62,855.00			\$61,613.63	\$124,468.63	Maintenance Repairs & Services
46166	Hoskins Supply Co., LLC	\$1,291.00				\$1,291.00	Student Activity
47573	Management Advisory Group Int'l	\$9,652.00	\$9,652.00	\$6,436.00		\$25,740.00	Salary Study
45503	Manage Mindfully, Inc.	\$59,983.63				\$59,983.63	Technology
34033	PenServ Plan Services, Inc.	\$1,351.25	\$1,570.00	\$1,123.75	\$1,327.50	\$5,372.50	Other Deductions
46234	Pro Kitchen Online, LLC	\$5,991.23	\$16,678.85	\$106,319.80	\$80,023.94	\$209,013.82	Maintenance Repairs & Services
35143	David McGhee	\$12,880.00		\$20,175.00		\$33,055.00	Building Improvements
46214	Summit Solutionsz, Inc.	\$270,131.26	\$911,863.50	\$38,374.38	\$17,649.74	\$1,238,018.88	Technology
33139	United Automotive & Diesel Perm	\$41,907.13	\$9,129.19	\$42,240.26	\$48,208.81	\$141,485.39	Maintenance Repairs & Services
35290	Wilson & Associates Turf & Ornam	\$6,764.94	\$4,510.00	\$9,020.00	\$193.50	\$20,488.44	Maintenance Repairs & Services
9452	Hi-Tech Power Systems, Inc.		\$5,990.63			\$5,990.63	Maintenance Repairs & Services
47991	Rike Roofing Services, Inc.		\$14,147.00			\$14,147.00	Maintenance Repairs & Services
44929	Cardiac Life Products, Inc			\$109.72	\$248.58	\$358.30	Health Supplies
46124	Torrey Johnson				\$105,918.21	\$105,918.21	Construction
		\$512,082.44	\$993,691.17	\$232,998.91	\$337,061.41	\$2,075,833.93	

Section 5240 (2) of the District's Procurement Code mandates that the Procurement Department submit progress reports quarterly that contain the following information:

### Summary

	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter	Total
(a) Number of Minority firms solicited	3	40	19	18	80
(b) Number of Minority bids received	0	1	0	0	1
(c) Total dollar amount of funds expended on contracts awarded to Minority firms certified pursuant to Section 11-35-5230 of the South Carolina Code of Laws	\$512,082.44	\$993,691.17	\$232,998.91	\$337,061.41	\$2,075,833.93
(d) Total dollar amount of funds expended	\$512,082.44	\$1,505,773.61	\$1,738,772.52	\$2,075,833.93	





## Minority Business Enterprise Utilization Plan

### **I. INTRODUCTION**

The South Carolina Consolidated Procurement Code Section 11-35-5010 requires that all State Agencies or Agencies that have adopted a procurement code that is substantially similar to the State code formulate a Minority Business Enterprise Utilization Plan (MBE Plan). The MBE Plan is designed to ensure that minority businesses are offered the opportunity to fully participate in the overall procurement process of the agency.

### **II. POLICY STATEMENT**

It is the intent of the Board of Education of the Consolidated School District of Aiken County (ACPSD) to ensure that those businesses owned and operated by minorities are afforded the opportunity to participate fully in the overall procurement process of the District. The ACPSD will support procedures that will result in awarding contracts and subcontracts to minority business firms in order to enhance minority capital ownership, overall District, Community and State economic development.

### **III. DEFINITIONS**

The definitions utilized in the Plan are contained in Section 11-35-5010, Code of Laws of South Carolina (1976), as amended.

#### **A. Minority-Owned Business**

As determined by the South Carolina Governor's Office of Small and Minority Business Assistance, a minority person is a United States citizen who is economically and socially disadvantaged.

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

B. A socially and economically disadvantaged small business is any small business concern which:

- a. is at least fifty one percent (51%) owned by one or more citizens of the United States who are determined to be socially and economically disadvantaged.
- b. in the case of a concern which is a corporation, fifty one percent (51%) of all classes of voting stock of such corporation must be owned by an individual determined to be socially and economically disadvantaged.
- c. in the case of a concern which is a partnership, fifty one percent (51%) of the partnership interest must be owned by an individual or individuals determined to be socially and economically disadvantaged and whose management and daily business operations are controlled by individuals determined to be socially and economically disadvantaged. Such individuals must be involved in the daily management and operations of the business.

The ACPSPD Procurement Department shall provide appropriate staff to assist minority businesses in the interpretation of regulations developed pursuant to this code; may in cooperation with other districts and appropriate private and state agencies, issue supplementary instructions designed to assist minority businesses with the District procurement procedures. The District shall maintain special source lists of minority business firms detailing the products and services they provide; and shall provide any firm an opportunity to identify as a certified South Carolina based minority business and ensure that these firms are solicited to on an equal basis.

#### **IV. MBE LIAISON OFFICER**

The ACPSPD Director of Procurement, or designee, shall be the MBE Liaison Officer for the District. The MBE Liaison Officer will report directly to the Chief Financial Officer.

#### **V. DUTIES OF THE MBE LIAISON OFFICER**

- A. Maintain all records and reports as required
- B. Develop, manage and implement the MBE program
- C. Disseminate information on available business opportunities so that MBE's are provided an equal opportunity to bid on services, supplies and construction.

#### **VI. ASSISTANCE TO SMALL AND MINORITY BUSINESSES**

- A. Subcontracting: Aiken County Public School District, through its contract documents, will encourage contractors to utilize MBE subcontractors on their projects.
- B. Division of Projects: When necessary, projects can be divided into smaller tasks so as to increase participation opportunities for MBEs. This will be accomplished by working with the end-user(s), OSMBA and MBE firms.

- C. Progress Payments: The District MBE Liaison, in cooperation with the Chief Financial Officer, may make special provisions for progress payments and letters of credit, as deemed reasonable to assist minority businesses to carry out the terms of a contract pursuant to regulations, which may be promulgated by the Board; as outline in South Carolina Procurement Code 11-35-5250.
- D. Letter of Contract Award: When a minority business firm certified by the Department of Revenue receives a contract with the District, the Purchasing Agent shall furnish a letter, upon request, stating the dollar value and duration of, and other information about the contract, which may be used by the minority firm in negotiating lines of credit with lending institutions; as outline in South Carolina Procurement Code 11-35-5250.

## **VII. MBE GOALS**

In its effort to foster effective broad-based competition for public procurement within the free enterprise system, the ACPSD aims to ensure the fair and equitable treatment of all persons who deal with the District's procurement system. Minority businesses will be solicited for participation in the overall procurement process. The District will strive to spend a minimum of 10% of total procurements with MBE firms.

## **VIII. FISCAL YEAR REPORTING**

The Minority Business Enterprise Utilization Plan shall be submitted to the ACPSD Board of Education on an annual basis for approval.

Semi-Annual reports shall be submitted in writing to the ACPSD Board of Education concerning the number and dollar value of contracts awarded to minority businesses during the fiscal year and contain the following information:

- A. Number of minority firms solicited;
- B. Number of minority bids received;
- C. Total dollar amount of funds expended on contracts awarded to minority firms certified pursuant to Section 11-35-5230 of South Carolina Code of Laws; and
- D. Total dollar amount of funds expended.

Annual reports shall be submitted to the ACPSD Board of Education no later than 30 days after the end of the fiscal year.