

Fiscal Year 2013-14

EDUCATIONAL CREDIT  
FOR EXCEPTIONAL  
NEEDS CHILDREN

## **Background**

Proviso 1.85. of the 2013-14 General Appropriation Act created the Educational Credit for Exceptional Needs Children. Program (Appendix A). Per the proviso, a nonprofit scholarship funding organization could award grants up to \$10,000 to cover the cost of tuition, transportation and textbooks to “exceptional needs students” attending eligible, independent schools in South Carolina. The nonprofit scholarship funding organizations received donations from individuals or corporations. These donations were in turn, eligible for South Carolina income tax credits, up to a maximum of \$8.0 million for Fiscal Year 2013-14, if the donations were made on or after January 1, 2014.

The proviso required the Education Oversight Committee (EOC) to:

1. Determine if an independent school met criteria to participate in the program;
2. Publish on its website an approved list of schools and nonprofit scholarship funding organizations “in good standing”; and
3. Establish an advisory committee made up of not more than nine members including parents, and representatives of independent schools and independent school associations to advise the EOC on implementation of the program.

At the conclusion of Fiscal Year 2013-14, the EOC had:

1. Established, with legal counsel, procedures to identify eligible schools and nonprofit funding scholarship organizations;
2. Published on its website the names of seventy-three (73) schools eligible to participate in the program;
3. Published on its website the names of five (5) nonprofit funding scholarship organizations in the state that could accept contributions and make grants; and
4. Solicited the names of individuals to serve on an advisory committee to guide the EOC on the program’s implementation.

## **Data Request**

To provide additional information to the public and policymakers, the EOC on July 21, 2014 wrote a letter to the five nonprofit funding scholarship organizations asking for the following information for the time period of July 1, 2013 through June 30, 2014: (Appendix B)

- Total dollar amount of revenues collected
- Total number of individual and corporate donors
- Total number of applications received
- Total number of applications approved
- Total number of applications denied
- Total number of eligible children awarded grants. “Awarded” is defined as checks being issued on or before June 30, 2014, or similarly, funds allocated or expended for grants by the nonprofit scholarship funding organization for specific individual students
- Total dollar amount of grants awarded and/or allocated
- Total number of eligible schools in which the eligible children were enrolled

- Of any balance of revenues/contributions as of June 30, 2014, what is the total amount of these revenues/contributions that are already obligated to eligible children who have applied for and been approved a grant for the 2014-15 school year?
- If you like to provide any information on the criteria used in approving or denying applications, the EOC would be interested in having the information.
- If you would like to share any information on the applicants (e.g. gender, ethnicity, or educational needs) but ***without providing personally identifiable information***, the EOC would be interesting in having such data.

## **Results**

The five nonprofit funding scholarship organizations responded to the EOC's request. Appendix C are the actual responses received. This self-reported information is documented below in Tables 1 and 2.

**Table 1**  
Revenues Collected and Awarded  
(Fiscal Year 2013-14)

<b>Nonprofit Scholarship Funding Organizations</b>	<b>Total Revenues Collected</b>	<b>Number of Individual and Corporate Donors</b>	<b>Total Amount of Grants Awarded</b>	<b>Any Revenue Obligated for Scholarships</b>
Advance Carolina	\$78,870	23	\$75,250	\$0
Donors Enriching Students' Knowledge (D.E.S.K.)	\$32,000	4	\$10,000	\$0
Palmetto Kids FIRST <sup>1</sup>	\$4,700,000	340	\$2,300,000	\$0
South Carolina Corporate Coalition for Community Service	\$0			
St. Thomas Aquinas	\$1,194,202	158	\$1,150,207	\$0
<b>TOTAL</b>	<b>\$6,005,072</b>	<b>525</b>	<b>\$3,535,457</b>	<b>\$0</b>

<sup>1</sup> Palmetto Kids FIRST Data are approximate dollar amounts. As reported by Palmetto Kids FIRST, these "figures may be adjusted slightly upon final CPA audit." In addition, Palmetto Kids FIRST reported that less than \$133,000 was retained for expenses and fees. And, "of the \$2.3 million available at the end of the fiscal year, 100% had been awarded in 2014-15 for grants as of August 5, 2014."

**Table 2**  
Applications and Awards  
(Fiscal Year 2013-14)

<b>Nonprofit Scholarship Funding Organizations</b>	<b>Number of Applications Received</b>	<b>Number of Applications Approved</b>	<b>Number of Applications Denied</b>	<b>Number of Children Awarded Grants</b>	<b>Number of Eligible Schools</b>
Advance Carolina	79	79	0	22	12
Donors Enriching Students' Knowledge (D.E.S.K.)	3	2	1	2	2
Palmetto Kids FIRST	300	300	0	300	16
South Carolina Corporate Coalition for Community Service	--	--	--	--	3
St. Thomas Aquinas	81	81	0	81	18
<b>TOTAL</b>	463	462	1	405	51

*Donors Enriching Students' Knowledge (D.E.S.K.)* explained that one application was denied due to the child not having documentation as being identified as eligible for special education services. In 2013-14 students making application for grants had to have an Individualized Education Plan (IEP) issued by a public school district verifying that the child was eligible for special education services. In school year 2014-15 the proviso governing the program was changed to allow children diagnosed by a private provider as needing specialized instruction and services to be eligible for the program as well.

*South Carolina Corporate Coalition for Community Service* explained that the Coalition's "interest over the last year has been to educate parents regarding the opportunities for the Scholarships. As such our method has been more methodical and grassroots in nature as we not try to rush children into the program but allow a natural interest of the program through education and awareness that provides parents with the most up to date and thorough information possible."

The EOC also asked the nonprofit scholarship funding organizations for information about the criteria used in making the grants. The responses appear below:

- *Advance Carolina* reported that a committee of three individuals makes the final determination. These individuals have no connections to the eligible schools receiving the grants and no children eligible for the grant.
- *Donors Enriching Students' Knowledge (D.E.S.K.)* reported that it "looks at the family's financial ability and the severity of the student's disability as criteria for a scholarship.

DESK prioritizes applicants with the severest educational and financial needs.” An independent panel composed of a former special needs public school teacher of the year and a former deputy superintendent at the South Carolina Department of Education and others review and award the scholarships.

- *Palmetto Kids FIRST* reported that it “does not collect financial data, but coordinate(s) based on a cooperative ‘honor system’ with our partnered schools to help families in need first. However, our goal is to fund 100% of our eligible ‘special needs’ applicants. We believe families of ‘special needs’ children have extensive medical, personal, time and financial burdens out of just school tuition.”
- *St. Thomas Aquinas* reported that enough funds were collected “to provide a scholarship to 100% of the applicants at a rate of 90%. In the future, if funding is constrained, we would apply a means test to determine which students were to receive scholarships to a greater extent than others. We would use the company FACTS that already has a contract with our diocesan schools.”

Finally, the EOC asked if the organizations would share information about the gender, ethnicity or educational needs of the students served in the program without providing personally identifiable information. The responses appear below:

- *Advance Carolina* can provide the EOC “with significant demographic data (e.g. gender, ethnicity, educational needs, etc.) without reveal personal identifiable information.”
- *Palmetto Kids FIRST* “does not collect data on race, gender, faith, education or financial needs, or any other distinguishing criteria on our applicant children, nor do we believe we should. We are 100% focused on supporting ALL eligible ‘special needs’ children without any discriminating knowledge as to the child’s distinguishing characteristics.”
- *St. Thomas Aquinas* reported the following demographic information. Of the 81 applicants
  - 19.7% were minority
  - 33% were female
  - 67% were male

## **Fiscal Year 2014-15**

The General Assembly reauthorized the ECENC Program in the 2014-15 General Appropriation Act through Proviso 1.80. Regarding implementation of the program in Fiscal Year 2014-15, the Education Oversight Committee reports that as of August 29, 2014:

- As of September 5, 2014, eighty-one (81) schools have qualified for the program for school year 2014-15 and are documented on the agency's website at [www.eoc.sc.gov](http://www.eoc.sc.gov). Two schools have been denied. One school did not provide the general education program as required by the proviso. The other school was not a member in good standing with the Southern Association of Colleges and Schools, the South Carolina Association of Christian Schools or the South Carolina Independent School Association
- One additional nonprofit scholarship funding organization has applied to participate in the program. The EOC has requested additional information from the applicant to comply with the reporting requirements of Proviso 1.80. of the 2014-15 General Appropriation Act.
- The Advisory Committee has been selected and includes the following individuals.

### **Two Parents**

Ms. Dorothy Cobb (Greer, SC)  
Mr. José Mulero (Lugoff, SC)

### **Two Representatives of Associations**

Mr. Edward Earwood  
Executive Director  
South Carolina Association of Christian Schools

Mr. Larry K. Watt  
Executive Director  
South Carolina Independent School Association

### **Five Representatives of Schools**

Mr. Don Blanch	Dr. Susan S. Thomas
Head of School	Head of School
Camperdown Academy	Glenforest School
Greenville, SC	West Columbia, SC

Ms. Kathy Cook	Ms. Joanna Swofford
Head of School	Director of EXCEL
Trident Academy	Westminster Catawba Christian School
Mt. Pleasant, SC	Rock Hill, SC

Mrs. Jacqueline Kasprowski  
Associate Director of Secondary Education  
Diocese of Charleston  
And Principal Cardinal Newman School  
Columbia, SC

## Appendix A

### Proviso 1.85. of the 2013-14 General Appropriation Act

**1.85.** (SDE: Educational Credit for Exceptional Needs Children) (A) As used in this proviso:

(1) 'Independent school' means a school, other than a public school, at which the compulsory attendance requirements of Section 59-65-10 may be met and that does not discriminate based on the grounds of race, color, religion, or national origin.

(2) 'Parent' means the natural or adoptive parent or legal guardian of a child.

(3) 'Qualifying student' means a student who is a South Carolina resident and who is eligible to be enrolled in a South Carolina secondary or elementary public school at the kindergarten or later year level for the current school year.

(4) 'Resident public school district' means the public school district in which a student resides.

(5) 'Tuition' means the total amount of money charged for the cost of a qualifying student to attend an independent school including, but not limited to, fees for attending the school and school-related transportation.

(6) 'Eligible school' means an independent school including those religious in nature, other than a public school, at which the compulsory attendance requirements of Section 59-65-10 may be met, that:

(a) offers a general education to primary or secondary school students;

(b) does not discriminate on the basis of race, color, or national origin;

(c) is located in this State;

(d) has an educational curriculum that includes courses set forth in the state's diploma requirements and where the students attending are administered national achievement or state standardized tests, or both, at progressive grade levels to determine student progress;

(e) has school facilities that are subject to applicable federal, state, and local laws; and

(f) is a member in good standing of the Southern Association of Colleges and Schools, the South Carolina Association of Christian Schools or the South Carolina Independent Schools Association.

(7) 'Nonprofit scholarship funding organization' means a charitable organization that:

(a) is exempt from federal tax under Section 501(a) of the Internal Revenue Code by being listed as an exempt organization in Section 501(c)(3) of the Code;

(b) allocates, after its first year of operation, at least ninety-five percent of its annual contributions and revenue received during a particular year to provide grants for tuition, transportation, or textbook expenses (collectively hereinafter referred to as tuition) or any combination thereof to children enrolled in an eligible school meeting the criteria of this section, and incurs administrative expenses annually, after its first year of operation, of not more than five percent of its annual contributions and revenue for a particular year;

(c) allocates all of its funds used for grants on an annual basis to children who are 'exceptional needs' students as defined herein;

(d) does not provide grants solely for the benefit of one school, and if the Department of Revenue determines that the nonprofit scholarship funding organization is providing grants to one particular school, the tax credit allowed by this section may be disallowed;

(e) does not have as a member of its governing board any parent, legal guardian, or member of their immediate family who has a child or ward who is currently receiving or has received a scholarship grant authorized by this section from the organization within one year of the date the parent, legal guardian, or member of their immediate family became a board member; and

(f) does not have as a member of its governing board any person who has been convicted of a felony, or who has declared bankruptcy within the last seven years.

(8) 'Person' means an individual, partnership, corporation, or other similar entity.

(9) 'Transportation' means transportation to and from school only.

(B) A person is entitled to a tax credit for the amount of money the person contributes to a nonprofit scholarship funding organization up to the limits of this proviso if:

(1) the contribution is used to provide grants for tuition, transportation, or textbook expenses or any combination thereof to exceptional needs children enrolled in eligible schools who qualify for these grants under the provisions of this proviso; and

(2) the person does not designate a specific child or school as the beneficiary of the contribution.

(C) Grants may be awarded by a scholarship funding organization in an amount not exceeding ten thousand dollars or the total cost of tuition, whichever is less, for students with 'exceptional needs' to attend an independent school. An 'exceptional needs' child is defined as a child who has been designated by the South Carolina Department of Education to meet the requirements of CFR Part A Section 300.8 and the child's parents or legal guardian believe that the services provided by the school district of legal residence do not sufficiently meet the needs of the child.

(D) (1) The tax credits authorized by subsection (B) may not exceed cumulatively a total of eight million dollars for contributions made on behalf of 'exceptional needs' students. If the Department of Revenue determines that the total of such credits claimed by all taxpayers exceeds this amount, it shall allow credits only up to those amounts on a first come, first serve basis.

(2) A taxpayer may not claim more than sixty percent of their total tax liability for the year in contribution towards the tax credit authorized by subsection (B). This credit is not refundable.

(3) If a husband and wife file separate returns, they each may only claim one-half of the tax credit that would have been allowed for a joint return for the year.

(4) The person shall apply for a credit under subsection (B) on or with the tax return for the period for which the credit is claimed.

(5) The Department of Revenue shall prescribe the form and manner of proof required to obtain the credit authorized by subsection (B). Also, the department shall develop a method of informing taxpayers if either of the credit limits are met at any time during the 2013 tax year.

(6) A person may claim a credit under subsection (B) for contributions made on or after January 1, 2014.

(E) A corporation or entity entitled to a credit under subsection (B) may not convey, assign, or transfer the deduction or credit authorized by this section to another entity unless all of the assets of the entity are conveyed, assigned, or transferred in the same transaction.

(F) Except as otherwise provided, neither the Department of Education, the Department of Revenue, nor any other state agency may regulate the educational program of an independent school that accepts students receiving scholarship grants pursuant to this proviso.

(G) (1) The Education Oversight Committee, as established in Chapter 6, Title 59, is responsible for determining if an eligible school meets the criteria established by subsection (A)(6), and shall publish an approved list of such schools meeting this criteria below. For this purpose, it also shall promulgate regulations further enumerating the specifics of this criteria. In performing this function, the Education Oversight Committee shall establish an advisory committee made up of not more than nine members including parents, and representatives of independent schools and independent school associations. The advisory committee shall provide recommendations to the Education Oversight Committee on the content of these regulations and any other matters requested by the Education Oversight Committee.

(2) (a) By the first day of August for the current fiscal year, the Education Oversight Committee, on its website available to the general public, shall provide a list with addresses and telephone numbers of nonprofit scholarship funding organizations in good standing which provide grants under this proviso, and a list of approved independent schools which accept grants for eligible students and which in its determination are in compliance with the requirements of subsection (A)(6).

(b) Student test scores, by category, on national achievement or state standardized tests, or both, for all grades tested and administered by an eligible school receiving or entitled to receive scholarship grants under this proviso must be transmitted to the Education Oversight Committee which in turn shall publish this information on its website with the most recent scores by category included.

(3) Any independent school not determined to be an eligible school under the provisions of this proviso may seek review by filing a request for a contested case hearing with the Administrative Law Court in accordance with the court's rules of procedure.

(4) The Education Oversight Committee, after consultation with its nine-member advisory committee, may exempt an independent school having students with exceptional needs who receive scholarship grants pursuant to this proviso from the curriculum requirements of subsection (A)(6)(d).

(H) (1) Every nonprofit scholarship funding organization providing grants under subsection (C), shall cause an outside auditing firm to conduct a comprehensive financial audit of its operations in conformity with generally accepted accounting principles and shall furnish the same within thirty days of its completion and acceptance to the Secretary of State and Department of Revenue which must be made available by them on their website for public review.

(2) Every independent school accepting grants for eligible students shall cause to be conducted a compliance audit by an outside entity or auditing firm examining its compliance with the provisions of this proviso, and shall furnish the same within thirty days of its completion and acceptance to the Secretary of State and Department of Revenue which must be made available by them on their website for public review.

APPENDIX B

MEMORANDUM

TO: Nonprofit Scholarship Funding Organizations

FROM: Melanie Barton *Melanie D. Barton*

DATE: July 21, 2014

IN RE: FY 2013-14 ECEN Program Updates

As you are aware, the General Assembly reauthorized the Educational Credit for Exceptional Needs Children for an additional fiscal year through proviso 1.80. of the 2014-15 General Appropriations Act. Proviso 1.80. requires each nonprofit scholarship funding organization to conduct a financial audit that documents at a minimum the following: “the total number of grants awarded, the total amount of each grant, and the names of the eligible schools receiving grants on behalf of the eligible students.”

The purpose for my writing is to ask each nonprofit scholarship funding organization to provide voluntarily the following information to the Education Oversight Committee (EOC). The information will be useful as a starting point to evaluate the results of the compliance audits. Any information provided is considered public information and will be used to report publicly on the activities of the program in Fiscal Year 2013-14. In essence, the request is for each nonprofit scholarship funding organization to provide the following information for the time period of July 1, 2013 through June 30, 2014:

- Total Dollar Amount of Revenues Collected
- Total Number of Individual and Corporate Donors
- Total Number of Applications Received
- Total Number of Applications Approved
- Total Number of Applications Denied
- Total Number of Eligible Children Awarded Grants. “Awarded” is defined as checks being issued on or before June 30, 2014, or similarly, funds allocated or expended for grants by the nonprofit scholarship funding organization for specific individual students

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Patti J. Tate

Mick Zais

Melanie D. Barton  
EXECUTIVE DIRECTOR

- Total Dollar Amount of Grants Awarded and/or allocated

- Total Number of Eligible Schools in which the eligible children were enrolled
- Of any balance of revenues/contributions as of June 30, 2014, what is the total amount of these revenues/contributions that are already obligated to eligible children who have applied for and been approved a grant for the 2014-15 school year?
- If you like to provide any information on the criteria used in approving or denying applications, the EOC would be interested in having the information.
- If you would like to share any information on the applicants (e.g. gender, ethnicity, or educational needs) but ***without providing personally identifiable information***, the EOC would be interesting in having such data.

If you have any questions or concerns, please let me know. If possible, I would like to have the information by August 1, 2014. You may mail or email the data.

APPENDIX C



615 St. Andrews Road  
Columbia, SC 29210

TO: Melanie Barton, Executive Director  
South Carolina Education Oversight Committee  
FROM: Edward Earwood, President  
Advance Carolina  
DATE: July 28, 2014  
RE: FY2013-2014 ECENC Program Update

I am writing in response to your recent request for voluntary release of information to the Education Oversight Committee (EOC). Advance Carolina, as a member of Access Opportunity South Carolina (AOSC), has signed the *Best Practices Pledge* of AOSC. A portion of the spirit of the best practice is detailed accounting regarding the use of funds as well as openness with our constituency. It is in this spirit that we provide EOC with the following data.

Total Dollar Amount of Revenues Collected	\$78,870
Total Number of Individual & Corporate Donors	23
Total Number of Applications Received	79
Total Number of Applications Approved	79
Total Number of Applications Denied	0
Total Number of Eligible Children Awarded Scholarships	22
Total Dollar Amount of Grants Awarded and/or Allocated	\$75,250
Total Number of Eligible Schools in which Students Enrolled	12
Total of Balance Obligated	-0-
Total Percentage of Revenues Awarded to Student Grants	95.4 %

In response to the final two questions, Advance Carolina has a committee that meets as needed to select recipients of grants. This committee is comprised of three persons that do not have any vested interest in the award of scholarships. They are not actively involved with any school receiving grants; further, they do not have children eligible for grants.

We are most willing to provide EOC with significant demographic data (e.g. gender, ethnicity, educational needs, etc.) without revealing personal identifiable information. This data has been submitted to AOSC and will be submitted to EOC in aggregate format.

Thank you for your efforts to execute matters relative to Proviso 1.85 (FY 2013-2014). Please let me know if there is anything else that I can do to assist you.

For the children of South Carolina,  
  
Edward Earwood  
President

www.advancecarolina.com

Phone: 803.798.7558 | Fax: 803.798.7548 | Mobile: 843.513.5010 | Email: info@advancecarolina.com



PO Box 12173  
Columbia, SC 29211  
Phone: 803-575-0037  
Email: info@scdesk.org

August 1, 2014

Mrs. Melanie Barton  
Executive Director  
South Carolina Education Oversight Committee  
PO Box 11867  
Columbia, SC 29211

Dear Mrs. Barton,

This letter serves as Donors Enriching Students' Knowledge (DESK) response to your memorandum dated July 21, 2014.

- Total dollar amount of revenues collected - \$32,000
- Total number of individual donors - 4
- Total number of applications received - 3
- Total number of applications approved - 2
- Total number of applications denied - 1
- Total number of eligible students funds were allocated for - 2
- Total dollar amount of allocated grants - \$10,000
- Total number of eligible schools in which eligible students were enrolled - 2
- Of the balance of revenues zero dollars have been obligated for grants in the 2014- 15 school year
- DESK looks at the family's financial ability and the severity of the student's disability as criteria for a scholarship. DESK prioritizes applicants with the severest educational and financial needs. After applications are received a independent panel made up of a former special needs public school teacher of the year, a former deputy-superintendent and others review applications and award scholarships.

If you have any other questions or would like clarification please let me know.

Best,

A handwritten signature in black ink, appearing to read 'Phillip Cease'. The signature is fluid and cursive, written over a white background.

Phillip Cease  
President

For more information about Donors Enriching Students' Knowledge  
please visit [www.scdesk.org](http://www.scdesk.org)

## Memorandum

**Date:** August 5<sup>th</sup>, 2014  
**To:** The SC Education Oversight Committee  
**From:** Olga Lisinska, Director of Operations  
**RE:** Response to Inquiry Regarding Program Results

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In response to your July 21st, 2014 letter (attached) for preliminary data related to the **Educational Credit for Exceptional Needs Children (ECENC)** and **Palmetto Kids FIRST Scholarship Program**, we are pleased to provide the EOC with the following responses:<sup>1</sup>

**1. Total Dollar Amount of Revenues Collected as of June 30<sup>th</sup>, 2014.**

- \$4.7 Million was raised by Palmetto Kids FIRST

**2. Total Number of Individual and Corporate Donors.**

- Approximately **340** individual donors ranging from **\$100 to \$1.52 Million each**.
- Zero “corporate” donors. Our experience in starting the 2<sup>nd</sup> largest tax credit scholarship organization under Georgia’s \$58 million program in 2008 is that large public corporations will not financially support educational tax credit programs in the early years due to the politically charged “school choice” debate. We communicate with corporations about the program and tax credit opportunities, but do not expect substantial “corporate” donations before the program is permanent and has a few years of experience.

**3. Total Number of Applications Received.**

- **300** applications were received from eligible children.

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<sup>1</sup> All responses are as of June 30<sup>th</sup>, 2014 unless otherwise noted. Figures may be adjusted slightly upon final CPA audit.

**4. Total Number of Applications Approved.**

- **ALL 300** applications from eligible children were approved.

**5. Total Number of Applications Denied.**

- **ZERO** applications from eligible children were denied.

**6. Total Number of Eligible Children Awarded Grants.**

- **ALL 300** applications from eligible children were awarded the legally maximum grant of full 2<sup>nd</sup> semester tuition (or \$10,000 if tuition was greater).

**7. Total Dollar Amount of Grants Awarded and/or allocated.**

- **\$2.3 Million** were awarded by Palmetto Kids FIRST as of 6/30/2014.
- **\$4.6 Million** as of today, 8/5/2014.

**8. Total Number of Eligible Schools in which the eligible children were enrolled.**

- **16** different schools from all across SC were awarded scholarship grants as of 6/30/2014. This was 100% of the schools Palmetto Kids FIRST was working with that had eligible children applying for grants.

**9. Of any balance of revenues/contributions as of June 30, 2014, what is the total amount of these revenues/contributions that are already obligated to eligible children who have applied for or been approved [for] a grant for the 2014-2015 school year?**

- Revenue: **\$4.7 Million** collected as of 6/30/2014
- Less: **\$2.3 Million** of 2<sup>nd</sup> Semester Scholarship Grants Awarded
- Less: **\$133,000** of expenses and fees (*2.8% vs. legal max of 5%*)
- Balance: **\$2.3 Million Available** for 2014-2015 Scholarships Grants

- **100% of the \$2.3 Million Available has been obligated and already issued for 2014-2015 scholarship grants as of August 5<sup>th</sup>, 2014.**
- As of August 5<sup>th</sup>, 2014, Palmetto Kids FIRST has eligible scholarship applicants requesting \$4 Million (and growing daily). We are busy raising the remaining \$1.7 Million necessary to once again fund 100% of our Palmetto Kids FIRST eligible applicants. **Please DONATE TODAY!!! [www.palmettokidsFIRST.org/donors](http://www.palmettokidsFIRST.org/donors)**

**10. If you like to provide any information on the criteria used in approving or denying applications, the EOC would be interested in having the information.**

- Palmetto Kids FIRST will, **when and if necessary due to limited funds**, issue grants based on financial need FIRST. We do not collect financial data, but coordinate based on a cooperative “honor system” with our partnered schools to help families in need first. However, our goal is to fund 100% of our eligible “special needs” applicants. We believe families of “special needs” children have extensive medical, personal, time and financial burdens outside of just school tuition. **We strongly recommend against any formal needs based criteria in the ECENC.**

**11. If you would like to share any information on the applicants (e.g. gender, ethnicity, or educational needs) but without providing personally identifiable information, the EOC would be interested in having such data.**

- Palmetto Kids FIRST does not collect data on race, gender, faith, educational or financial needs, or any other distinguishing criteria on our applicant children, **nor do we believe we should**. We are 100% focused on supporting ALL eligible “special needs” children without any discriminating knowledge as to the child’s distinguishing characteristics. **All we need to know is they are “special needs”!!!**

If we can be of any assistance, please feel free to let us know. Thank you.

Olga Lisinska, [info@palmettokidsFIRST.org](mailto:info@palmettokidsFIRST.org), 843-901-1842 (office)

**[www.palmettokidsFIRST.org](http://www.palmettokidsFIRST.org)**  
**[www.facebook.com/palmettokidsFIRST](https://www.facebook.com/palmettokidsFIRST)**



**ST. THOMAS  
AQUINAS**  
SCHOLARSHIP FUNDING  
ORGANIZATION

1662 Ingram Road  
Charleston, SC 29407  
Phone: 843-853-2130  
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Education Oversight Committee  
Nonprofit Scholarship Funding Organizations  
Attn: Ms. Melanie Barton, Executive Director  
P.O. Box 11867  
Columbia, SC 29211

July 29, 2014

Dear Ms. Barton,

Please find the following information per your request in a memo on July 21, 2014.

- Total Dollar Amount of Revenues Collected: \$1,194,202.00
- Total Number of Individual and Corporate Donors: 158
- Total Number of Applications Received: 81
- Total Number of Applications Approved: 81
- Total Number of Applications Denied: 0
- Total Number of Eligible Children Awarded Grants: 81
- Total Dollar Amount of Grants Awarded/Allocated: \$1,150,207.46
- Total Number of Eligible Schools in which the eligible children were enrolled: 18
- Balance of revenues/contributions as of June 30, 2014: \$21,642.00
- Criteria in Approving or Denying Applications:

We were blessed to collect enough funds to provide a scholarship to 100% of the applicants at a rate of 90%. In the future, if funding is constrained, we would apply a means test to determine which students were to receive scholarships to a greater extent than others. We would use the company FACTS that already has a contract with our diocesan schools. We are prepared to implement its use if necessary.

- Information About Applicants:
  - 19.7% minority enrollment
  - 33% female applicants
  - 67% male applicants

As always, we thank you for your assistance in these matters and are always available for any questions or concerns.

Sincerely,

John L. Barker, CPA, CGMA  
Treasurer

## **South Carolina Corporate Coalition for Community Services**

Email Response:

*Greetings Melanie -*

*Please find copies of the ENEC Program updates from the South Carolina Corporate Coalition for Community Services. The Coalition's interest over the last year has been to educate parents regarding the opportunities for the Scholarships. As such our method has been more methodical and grassroots in nature as we not try to rush children into the program but allow a natural interest of the program through education and awareness that provides parents with the most up to date and thorough information possible.*

*Attached you will find our comments regarding your questions.*

*Please let me know should you have any additional questions.*

*Thanks,  
Stephen Gilchrist*

- Total Dollar Amount of Revenues Collected **(None)**
  - Total Number of Individual and Corporate Donors **(None ongoing)**
  - Total Number of Applications Received **(One)**
  - Total Number of Applications Approved **(None)**
  - Total Number of Applications Denied **(None)**
  - Total Number of Eligible Children Awarded Grants. "Awarded" is defined as checks being issued on or before June 30, 2014, or similarly, funds allocated or expended for grants by the nonprofit scholarship funding organization for specific individual students **(None)**
    - Total Dollar Amount of Grants Awarded and/or allocated **(None at this point)**
    - Total Number of Eligible Schools in which the eligible children were enrolled **(Three)**
    - Of any balance of revenues/contributions as of June 30, 2014, what is the total amount of these revenues/contributions that are already obligated to eligible children who have applied for and been approved a grant for the 2014-15 school year? **(No revenue has been collected therefore no funds have been allocated or obligated.**

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