

Finance and Operations Administrative Rules and Procedures

Table of Contents:

C-1:	Fiscal Management Goals, responsibilities, and Objectives
C-2:	Annual Budget
C-3:	Determination of Budget Priorities
C-4:	Budget Adoption Process
C-5:	Budget Transfers and Carryover Funds
C-6:	Taxing and Borrowing
C-7:	Funding Proposals, Grants, and Special Projects
C-8:	Tuition Income
C-9:	Authorized Signatures
C-10:	Bonded Employees and Officers
C-11:	Fiscal Accounting and Reporting
C-12:	Inventories
C-13:	Audits/Financial Monitoring
C-13R:	Audits/Financial Monitoring
C-14:	Purchasing
C-14R:	Competitive Food Sales/Vending Machines
C-14R:	Minority/Women Business Enterprise Utilization Plan
C-15:	Sales Calls to Staff
C-16:	Payment Procedures
C-17:	Salary Deductions
C-18:	Expense Authorization/Reimbursement
C-19:	Cash In School Buildings
C-20:	School Properties Disposition
C-21:	Site Based Governance Procedure- Deleted
C-21R:	Site Based Governance of Schools- Deleted
C-22:	Transportation Services
C-23:	Facilities Use
C-23E:	Facilities Use Fee Schedule
C-24R:	Facilities Use Guidelines
C-24:	Animals In School Buildings
C-25:	Key Control
C-25F:	Key Control Request Form
C-25L:	Key Control Tracking Log
C-26:	Food Services
C-27:	Building, Grounds, and Property Management and Maintenance
C-28:	Security
C-28R:	Security and Video Surveillance
C-29:	Energy Conservation
C-30:	Crisis Plans
C-31:	Safety/Emergency Drills

- C-32: Emergency School Closings, Delayed Openings, and Early Dismissals
- C-33: Data/Records Retention
- C-33R: Records Management
- C-34: Facilities Planning and Development

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C-1 1 FISCAL MANAGEMENT GOALS s and RESPONSIBILITIES and PRIORITY OBJECTIVES

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~~The purpose of documenting the responsibilities of the Finance Department is~~ To establish the superintendent's expectations for the sound fiscal management of the ~~district~~ Beaufort County School District (District).

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The quantity and quality of learning programs are directly dependent on the funding provided and the effective, efficient management of those funds. Therefore, achievement of the ~~district's~~ District's goals can best be made through excellent fiscal management.

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~~The Finance Department is assigned responsibility for the District's fiscal management. It is the responsibility of the Finance Department's function to~~ accomplish the following key functions:

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- Develop an operating budget that meets the priorities of the superintendent, using the best available techniques and processes for budget development and management to achieve the Board of Education goals
- Monitor the spending of ~~district~~ District funds in accordance with the approved budget, the Beaufort County School District Procurement Code, grant guidelines, and federal and state guidelines
- Provide timely and appropriate information to the ~~board~~ Board of Education and all staff with fiscal management responsibilities
- Develop, operate and maintain accounting systems to: control spending, safeguard ~~district~~ District assets, and comply with federal and state requirements
- Comply with and provide reporting to federal and state government agencies including, but not limited to, the IRS, Social Security Administration, SC Department of Revenue, and the SC Employment Security Commission
- Reconcile the District's cash balances held by the Beaufort County Treasurer
- Ensure compliance with generally accepted accounting principles
- Produce the annual audited Comprehensive Annual Financial Report (CAFR)
- Monitor the District's fund balance
- Monitor investments held
- Issue general obligation bonds and monitor bond payments
- Establish and implement efficient procedures for accounting, reporting, investing, purchasing, receiving, payroll, payment of vendors and contractors and all other areas of fiscal management
- Establish and maintain effective internal controls

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~~This document is organized into nine key segments. The policies and procedures for each of these areas of Finance are defined with this report.~~

--Adopted: July 12, 2001
Revised: _____

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C-2 ANNUAL BUDGET

Purpose: To establish the superintendent's expectations for the annual operating budgets of the Beaufort County School District (District).

The annual budget is the financial plan for the operation of the school system. District is comprised of the annual budgets. The district District will express those plans through three types of budgets:

A. Operating Budget - a budget for the provision of annual resources.

- **Debt Service Budget** - a budget for the provision of annual resources for the retirement of principal and interest payments.

B. Capital Budget - a budget for the provision of necessary sites, buildings and equipment.

The budgets provide the framework for both expenditures and revenues for the year. They translate into financial terms the educational programs and priorities for the system.

The superintendent will have overall responsibility for budget preparation. The superintendent will recommend annual Operating Debt Service and Capital Budgets for Board of Education (Board) approval.

Planning the budget document is a continuous process. Planning involves long-term thought, study, and deliberation by the superintendent, the board Board, administrative staff, faculty and citizens of the District.

The development of the Operating Budget begins late in each calendar year with the determination of budget priorities. The budget process proceeds through adoption by the Board, usually in May, and subsequent approval of the millage rate by the Beaufort County Council near June 30th of each year.

The Operating Budget is developed using:

- Projected student enrollments using the "Pipeline" Method
- Non-salaried school budgets using both the District developed Base Student Cost Formula (BSCF) and a Modified Zero Base (MZB) format
- Special Services Program Funding
- Staffing Formulas
- Department budgets using a Modified Zero Base (MZB)

The Debt Service Budget will be developed with the assistance of the District's Contracted Financial Advisor. The budget will reflect the most economical and effective method of retiring outstanding debt.

The development of the Capital Budget (8% Projects Budget) occurs annually between January and April and is a collaborative effort between the schools and District-level departments. It is the responsibility of the District's Facilities Planning and Construction (FPC) staff to work with the schools, District maintenance staff, and District Office staff to gather input to identify school and District needs and establish priorities during the planning phase. The FPC uses the collected input to develop data and to evaluate and prioritize the needs for the 8% capital projects under consideration.

When project needs are prioritized, the FPC develops cost estimates for the projects and presents its proposed 8% Capital Projects Plan (Plan) to the District's Chief Operational Services Officer (COSO). The COSO and her/his staff determine the availability of funds and further refine the Plan for the superintendent's consideration.

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In May, the superintendent's recommended Plan is presented to the Board for final approval. Once the Board approves the final project list, it is the responsibility of the Finance Office to distribute the project list to the schools, post it on the District's website, and monitor and record the progress of the projects.

Adopted: July 12, 2001

Revised: July 12, 2001

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C-3 DETERMINATION of BUDGET PRIORITIES

Purpose: To establish the superintendent's procedures for establishing the budget priorities of the Beaufort County School District (District) and the basic structure to carry out those procedures.

Using the Boards goals the superintendent initiates the budget process by working with staff to establish the budget priorities for the new fiscal year. S/he then conveys the established priorities and resulting expectations for the annual budget to the Chief Operational Services Officer (COSO). The COSO and her/his staff then translate the budget priorities and expectations into monetary terms and begin developing the Operating Budget Debt Service and Capital Budgets.

With assistance from the Management Team, the superintendent will present and recommend budget priorities to the Board of Education (BoE) for each fiscal year (July 1 – June 30). These priorities will be based upon the needs identified during the budget planning process as determined by the following:

- Academic achievement goals as specified by the Board of Education
- Educational program needs of the District
- State and/or federal legal requirements for funding of programs
- Requirements and regulations of the regional accrediting agency
- Availability of fiscal and other non-economic resources
- Fund balance requirement as determined by the Board of Education

Adopted: July 12, 2001

Revised:

C-4 BUDGET ADOPTION PROCESS

Purpose: To establish the basic structure for the adoption of the annual budget of the Beaufort County School District (District).

The superintendent has the overall responsibility for the District's budget planning.

At the direction of the superintendent, school principals shall develop and recommend budgets for their schools after seeking input from the school staff, the School Improvement Council, and a representative from the parent-teacher organization (PTO) and/or SIC. The budgets submitted by the principals shall reflect her/his judgment as to the most effective and efficient ways to use resources to achieve the educational objectives of the school.

At the direction of the superintendent, department heads shall develop and recommend budgets for their departments after seeking input from department staff. The budgets submitted by the department heads shall reflect her/his judgment as to the most effective and efficient ways to use resources to support the educational objectives of the District.

The superintendent will recommend an annual **Operating Budget** to the Board of Education (Board). The Board will give careful consideration to the budget request as presented by the superintendent and will review the allocations for fairness and for consistency with the educational priorities of the District.

On the date(s) specified by the Beaufort County Council (Council), the superintendent and the Board will present, in a manner mutually agreed upon by the Council and the Board, the general **Operating Budget** for the operation of schools in the county for the ensuing fiscal year.

In case the budget does not receive approval by June 30, the superintendent will recommend that the Board adopt a continuing resolution based on last year's operating budget until the budget can be approved.

Adopted: July 12, 2001

Revised:

Legal references:

S.C. Code of Laws, 1976, as amended:

§ 6-1-80: Budget adoption

Acts and Joint Resolutions:

1968 Act 994, p 2384 - Budget prepared by county board of education; approved by County Council; increase in millage approved by County legislative delegation.

C-5 BUDGET TRANSFERS and CARRYOVER FUNDS

Purpose: To establish the basic structure for budget transfers within the Beaufort County School District (District).

Budget Transfers:

Periodically, the Chief Operational Services Officer will examine budget categories and estimate the year-end status of each. Based on these estimates, the superintendent authorizes his/her designee to make budget transfers within the major categories.

The superintendent grants principals/department heads discretionary authority to make non-salary budget transfers at the individual school/department level under the following conditions:

- Requests for changes to a school/departmental budget may be made by an electronic budget transfer.
- Budget transfers may only occur within a fund.
- Budget transfers with line items exceeding \$5,000.00 must be approved by the Chief Operational Services Officer (COSO).
- Only the superintendent or the COSO is authorized to approve transfers of salary line items in the general fund.

Each school/department shall be given a copy of approved budget transfers and a copy is maintained in the Finance Department. The distribution of the school/department copy shall serve as notification that the transfer was posted to the general ledger.

Periodically, the COSO will examine budget categories and estimate the year-end status of each. Based on these estimates, the superintendent authorizes his/her designee to make budget transfers within the major categories. Transfers outside of program functions (e.g. instructional, support, etc.) exceeding \$25,000 must be approved by the Board of Education.

Budget transfer requests within the capital projects funds are requested by the project managers via e-mail. Transfers within a school location are authorized by the project manager. Transfers to/from the District's construction contingency accounts must be authorized by the District's Facilities Planning and Construction Officer.

Carryover Funds:

The administrative staff shall operate the school system within the budget established for the particular department or school. Carryover funds in General Fund accounts are not permitted.

Adopted: July 12, 2001
Revised:

C-6 TAXING AND BORROWING

Purpose: To establish the basic structure and responsibility for the superintendent's recommendations for taxing and borrowing funds for the maintenance and operation of the Beaufort County School District (District).

Annual Tax Levy:

Each school district's taxing authority is established by state law. In Beaufort County, that authority is vested in County Council and legislative delegation within statutory limitations.

Borrowing:

The Board of Education (Board) is permitted, by law, to borrow money in anticipation of collection of taxes. The purpose of such borrowing is to secure funds for District operations. The Board must approve the issuance of tax anticipation notes. It is the responsibility of the superintendent to recommend such action to the Board.

Sale of Bonds:

In order to obtain funds for capital improvements, the Board may, from time to time, issue bonds. The limit of District bonded indebtedness is subject to the provisions of Article X of the South Carolina Constitution. It is the superintendent's responsibility to recommend the issuance of such bonds.

In order for the District to sell bonds in excess of the limitation stated in Article X, the community must vote for a referendum allowing such sale. The superintendent is responsible for recommending such elections.

Adopted: July 12, 2001
Revised:

Legal references:

South Carolina Constitution:

Article X, § 15(6):	Provides for maximum debt limit of eight percent.
Article X, § 15(7):	Provides for borrowing in anticipation of collection of ad valorem taxes.

S.C. Code, 1976, as amended:

§ 11-27-10 thru § 11-27-100:	Effect of Article X of SC Constitution (see above) on statutes prior to its ratification. See especially §11-27-50 regarding the effect of Article X on school district bonds.
§ 59-71-10 thru § 59-71-190:	(The School Bond Act) - Statutes regulating the issuance of general obligation bonds by school districts, in effect prior to the ratification of Article X of S. C. Constitution.

Acts and Joint Resolutions:

1968 Act 994, p. 2384:	Budget prepared by county board of education, approved by county council; increase in millage approved by county legislative delegation.
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C-7 FUNDING PROPOSALS, GRANTS, and SPECIAL PROJECTS

Purpose: To establish the basic structure for the seeking of additional sources of revenue for the Beaufort County School District (District).

In order to offer the best educational opportunities possible for students of the District and in order to supplement the funds provided through local taxes and the basic aid provided by the state, the superintendent will seek revenue from as many alternate sources possible. The superintendent will notify the Board of Education (Board) of all funding proposals that he/she intends to pursue.

Grants from Private Sources:

The District will seek grants of money, securities, property, etc. from private sources for scholarships, staff development and other educational improvement purposes.

Such gifts in excess of \$1,000.00 will be submitted to the Board for approval; will be administered by the superintendent; and will be used in a manner that complies with the terms of the gift or bequest.

The superintendent will not recommend the acceptance of bequests, endowments or other gifts if the conditions of the gift remove any portion of the public schools from control of the Board.

Modification or Construction of Facilities Through the Use of Private Funds:

The superintendent may seek or accept private funds to be used to modify and/or to construct District facilities on District property under the following conditions:

- The Board must review and approve modification or construction project plans as presented by the District's Facilities, Planning, and Construction Office prior to any fundraising effort. (Note: "Modifications" include, but are not limited to, projects such as the attachment of cabinets to the walls of District facilities.) Such plans shall include:
 - Complete and comprehensive description of the proposed project
 - estimates of upfront and ongoing costs the District may or will incur if the project is completed;
 - Consideration of any effect completion of the project may or will have on the District's compliance with the rules, regulations, and policies of Title IX; and
 - Consideration of any effect completion of the project may or will have on the District's equitable provision of facilities to same or similar school facilities.
- Unless the Board specifically agrees in advance, such projects must:
 - Be fully funded without the use of District funds;
 - Be fully funded prior to the commencement of work;
 - Be in full and complete compliance with the rules, regulations, and policies of the South Carolina Office of School Facilities;
 - Provide the District with full and complete ownership and control of the result or the modification or construction; and
 - Comply with District policies regarding the naming of facilities.

Adopted: July 12, 2001

Revised:

Legal references:

S.C. Code 1976, as amended:

- § 59-19-170: Acceptance and holding of property by trustees.
- § 59-19-180: Purchase of land by trustees.
- § 59-69-30: Investment of such fund.

S. C. Attorney General's Opinion:

1968-69-Opinion No. 2655, p. 71

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C-8 TUITION INCOME

Purpose: To establish the basic structure for collection of tuition from nonresident students of the Beaufort County School District (District).

On behalf of the Board of Education, the superintendent may collect tuition from nonresident students enroll, or are enrolled, in the District's schools. The superintendent may set or reconfirm the fee on an annual basis. The fee is based on the per pupil cost of District funds (see also A-15 Nonresident Students).

The superintendent may collect tuition in advance of enrollment. The superintendent shall deposit such funds into the general fund.

Adopted: July 12, 2001
Revised:

Legal references:

S.C. Code, 1976, as amended:

- § 59-19-90(10): Power of board to transfer and assign students.
- § 59-63-30: Qualifications for attendance.
- § 59-63-45: Procedures for reimbursement for districts for cost of educating non-resident students.
- § 59-63-480 & 490: Attendance at schools in adjacent county.

C-9 AUTHORIZED SIGNATURES

Purpose: To establish the basic structure for the signing of checks drawn on Beaufort County School District (District) and the District's schools' accounts and for the signing of other internal, finance-related documents.

The superintendent is authorized by the Board of Education to sign payroll and accounts payable checks. All contracts in excess of \$2500 must be signed by the superintendent. Only Chief Officers may sign contracts up to \$2500. No other staff, including principals, have authority to sign contracts.

Each of the District's schools' principals is authorized by the superintendent to sign checks on her/his school's accounts. In case of emergency and with prior approval by the District's Chief Operational Services Officer, an assistant principal is authorized to sign checks on her/his school's accounts.

School principals and department heads must sign all District purchase orders, payment requests, timesheets, stipend requests, and absentee forms. In the event of a **planned** absence of the principal or department head, a letter must be forwarded to the Purchasing Office authorizing another administrator to sign financial documents during a specified period of time.

Adopted: July 12, 2001
Revised:

C-10 BONDED EMPLOYEES AND OFFICERS

Purpose To establish the basic structure and conditions of Beaufort County School District (District) employees who handle certain funds, equipment, and supplies.

The superintendent will maintain an adequate bond for all District personnel who as part of their official duties handle school and public funds, equipment and supplies. The bond will be sufficient to cover any loss incurred by the District.

Adopted: July 12, 2001
Revised:

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C-11 FISCAL ACCOUNTING AND REPORTING

Purpose: To establish the superintendent's expectations for accounting for and reporting of the financial resources of the Beaufort County School District (District).

The District's accounting system will provide an accurate record of financial transactions. The Chief Operational Services Officer (COSO) will maintain accounting procedures adequate to properly record all financial transactions in accordance with the **Financial Accounting Handbook** developed by the South Carolina State Department of Education.

The superintendent is ultimately responsible for receiving and properly accounting for all funds of the District.

The superintendent or COSO will present the Board of Education (Board) with quarterly financial statements providing an up-to-date report on expenditures and receipts as well as the financial condition of the District.

Annual financial reports are prepared and posted to the District's website, and bound copies are distributed to the superintendent, Board members, the Audit Committee, the Finance staff, and interested community members. The District's audited financial statements must be submitted to the SC Department of Education by December 1st of each year.

Adopted: July 12, 2001

Revised:

Legal references:

S. C. Code 1976, Amended:

§ 59-13-60: Spending priority; audits; reports; Education Finance Review Committee.

§ 59-20-80: School budgets will be made public; itemization of salaries

C-12 INVENTORIES

Purpose: To establish a basic structure for the accurate inventory of Beaufort County School District (District) property.

The superintendent is responsible for setting up and maintaining an asset inventory system that preserves an accurate record and inventory of materials, equipment and real estate in the District.

The Finance Department is responsible for providing a fixed asset listing to each school/department on an annual basis. The listing shall be reviewed by the principal/department head or his/her designee. Any variances should be noted on the listing and a copy returned to the Finance Office.

It is the responsibility of each department head and school principal to maintain the accuracy of the fixed assets within the jurisdiction of their school or department. The District's **Fixed Assets Accountant** is responsible for monitoring the District's property records and to insure compliance with policy and current regulations.

Each year prior to the closing of school, the principal of each school will arrange for an inventory of textbooks. The inventory will include the serial numbers of all equipment. Additionally each school will receive annually from the District Office a fixed asset inventory list to be reviewed and updated. The principal will forward the corrected inventory list to the District's **Property Accounting Agent** for District accounting purposes.

The principal will keep the inventory on file in his/her office. The principal will forward a copy of the furniture and equipment inventory to the district's property accounting agent for district accounting purposes.

Adopted: July 12, 2001
Revised:

Legal references:

State Board of Education Regulations:

R-43-174: Accounting and reporting inventories.

C-13 AUDITS/FINANCIAL MONITORING

Purpose: To establish the basic structure for auditing and monitoring the financial activities of the Beaufort County School District (District).

In accordance with state law and regulation, all District financial records will be audited following the close of each fiscal year.

The Board of Education (Board) will employ a certified public accountant as recommended by the Audit Committee to conduct the annual audit. The auditing firm must be certified public accountants and should have appropriate experience in the audit of governmental units, specifically school districts in the state of South Carolina.

The completed audit will be presented first to the Audit Committee and then to the Board and the public at a regularly scheduled Board meeting. The Board will make copies available to the public and the media.

The District will forward a copy of appropriate audits to the State Department of Education and other entities as required by applicable state law or regulations.

The school funds in the District will also be audited annually.

Adopted: July 12, 2001

Revised:

Legal references:

S. C. Code, 1976, as amended:

§ 59-20-60: Audit Requirements of the Education Finance Act.

State Board of Education Regulations:

R-43-175: Audits

C-13R AUDITS/FINANCIAL MONITORING

Purpose: To describe the audit process of the Beaufort County School District (District) and selection of the District's professional auditing firm.

The District procures the services of a professional auditing firm for the primary purposes of examining documents, records, reports, systems of internal control and accounting, and the financial transactions of the District for the fiscal year, which begins July 1 and ends June 30. The selected auditing firm(s) must be certified public accountants and should have appropriate experience in the audit of governmental units, specifically school districts in the state of South Carolina.

The financial transactions of the District are centralized at the District Office. This includes the transactions of club accounts and various other activity accounts, as well as the cafeteria operations. The District records financial transactions in one of eight funds maintained by the District:

- 1) General Fund
- 2) Special Revenue Fund
- 3) Education Improvement Act Fund
- 4) Debt Service Fund
- 5) Capital Projects Fund
- 6) Food Service Fund
- 7) Internal Service Fund
- 8) Student Activities Fund

The proposal and plan for the annual audit must provide for:

1. **Scope:** Indication and description of the financial operations to be included in the audit and any specified limitations imposed on the procedures to be carried out by the auditor.
2. **Schedule:** Statement of the date the audit is to begin; the anticipated completion date; and the date the audit report is to be delivered.
3. **Compensation:** The proposal must specify the basis of compensation for professional audit services. The terms, conditions, and time of payment must be stated. There should be provisions for additional compensation in the event unforeseen situations requiring services of a special nature arise during the audit.
4. **Management Letter:** As a part of the audit, the audit firm shall render a management letter disclosing and describing any deficiencies in the financial operations of the District and any necessary corrective measures the District should implement.

The proposals will be reviewed by the Audit Committee, and a selection will be made based on the professional competence and appropriate experience of the various auditing firms.

Adopted:

Revised:

C-14 PROUCUREMENT / PURCHASING

Purpose: To establish the basic structure for the expenditure of Beaufort County School District (District) funds.

It is the expectation of the superintendent that all matters involving purchasing will be conducted in accordance with the District's Procurement Code, adopted July 1985, and revised. A copy of the Procurement Code can be found in the District's Purchasing Office and on the District website.

The Chief Operational Services Officer (COSO) is responsible for the District's overall compliance with the Procurement Code.

Reporting to the Financial Services Officer (FSO), the Purchasing Department is responsible for the application of the Procurement Code in the District's purchasing processes. The Procurement Office shall:

- Ensure adherence to and compliance with the District's Procurement Code
- Monitor District expenditures for compliance with Board of Education (Board) Policies
- Maximize the value of the District's expenditures
- Write and issue all District procurement solicitations, including construction projects, such as Requests for Proposal (RPF), Requests for Quotation (RFQ), etc.
- Review and recommend all contracts for the superintendent's signature
- Administer contracts
- Review all requisitions and issue purchase orders
- Oversee the District's Purchasing Card Program and all equipment rental contracts

Except in special circumstances, District Department Chiefs and/or Officers, or their designee, shall be responsible for management of contractors that fall within their department's jurisdiction. The District's Procurement Office will assist in the administration of contracts.

As designees of the superintendent, school principals may negotiate and recommend for the superintendent's signature vending machine contracts. Such actions by the principals must comply with C-14R "Competitive Food Sales/Vending Machines".

Adopted: July 12, 2001

Revised:

C-14R COMPETITIVE FOOD SALES/VENDING MACHINES

Purpose: To establish the guidelines by which Beaufort County School District (District) school principals may negotiate and recommend beverage and snack vending machine (Vending Machine) contracts.

Because the District neither expends nor receives funds from contracts with vendors that supply beverage and snack Vending Machines installed on school premises, the District's Procurement Office does not solicit contracts for these services. At her/his discretion, each school principal may independently pursue and recommend for the superintendent's signature contracts for Vending Machines for her/his school. The following guidelines shall be followed:

- 1) If Vending Machines are desired, each school principal must solicit vendor proposals for her/his school's Vending Machines only after seeking authorization from the Procurement Office.
- 2) Only District High Schools are permitted to allow student access to Vending Machines.
- 3) Vending Machine sales to students are strictly prohibited during the breakfast serving period and from one hour prior to the first lunch period until one hour after the final lunch period.
- 4) Regarding beverage and snack content, all Vending Machine sales to students shall comply with the District's Wellness Policy [formerly found in Board of Education (Board) Governance Policy P-26 – Wellness].
- 5) All Vending Machine content must also comply with the national "School Beverage Guidelines" published by The American Beverage Association and The Alliance for a Healthier Generation and the "School Snacks Guidelines" published by ...
- 6) All Vending Machine commissions and compensation incentives received by each school shall be deposited into the school's Student Activity Account and reported to the Finance Department with other financial activities at the usual times.
- 7) Principals are reminded of Board and District policies prohibiting payoffs and kickbacks in conducting District business.

Adopted:

Revised:

C-14R MINORITY/WOMEN BUSINESS ENTERPRISE (M/WBE) UTILIZATION PLAN

Because the Board of Education (Board) believes it is in the best interest and long-term benefit to the community and the District to ensure Minority and Women owned Business Enterprises (M/WBE) have opportunities to participate in the District's procurement process, and to minimize disparities between contract awards for the District's purchases of goods and services to M/WBEs and non-minority business enterprises, at the Board's direction, the Superintendent and District Administration will be guided by the following principles:

- In conformance with state laws and regulations, the District will encourage and promote maximum opportunity for and participation by qualified M/WBEs in the District's procurement and contract award process.
- The District will regularly review, develop, and implement such additional rules and standards as to promote and achieve the Board's M/WBE policies.
- The District will establish progressive annual objectives and implementation measures for increased participation by M/WBEs.

Participation Goals:

The District will actively solicit participation in the District's procurement process by state-certified M/WBEs in such manner as to achieve the following goals for contracts awarded for all new expended offerings for the procurement of supplies, services, and construction:

- 1) As of January 1, 2007: A minimum of five percent (5%)
- 2) As of January 1, 2008: A minimum of ten percent (10%)
- 3) As of January 1, 2009: A minimum of fifteen percent (15%)
- 4) As of January 1, 2010: A minimum of twenty percent (20%)

Definitions:

The definitions used in this plan are taken from § 11-35-5010, Code of South Carolina (1976), as amended.

1. "Minority person" for the purpose of this article, means a United States citizen who is economically and socially disadvantaged.
 - (a) "Socially disadvantaged individuals" means 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 or designated agency.
 - (b) "Economically disadvantaged individuals" means 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.
2. A "socially and economically disadvantaged small business" means any small business concern which:

- (a) is at least fifty-one percent 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 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 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 concerned.

State Certification:

Effective January 1, 2007, a business seeking certification as an M/WBE must be certified to determine the enterprise's ownership by minorities and/or women based on the definitions in this regulation. Businesses seeking certification should contact:

Address: Governor's Office of Small and Minority Business Assistance
Division of Rural Development
Edgar A. Brown Building
1205 Pendleton Street, Suite 329
Columbia, SC 29201

Telephone: (803) 737-0657
Facsimile: (803) 734-2498

Procurement Formats:

The District will evaluate all projects and/or anticipated contracts prior to bid, in accordance with the strategies contained in this regulation, to reduce the size and/or scope, determine exemptions, and foster open competition to meet the Board's M/WBE goals.

Options for determining size and/or scope are:

- The full quantity of a given item(s) on a large contract may be placed on a separate contract for bidding;
- A partial quantity of a given item(s) on a large contract for bidding;
- The term of the contract may be shortened, resulting in a dual effect: 1) reduction of the quantities required and 2) reduction of the risk inherent in guaranteeing prices over a longer time period;
- Work to be performed may be grouped according to geographic location and placed on separate contracts;
- Unrelated scopes of work to be performed or portions not requiring completion by a single bidder may be placed on separate; and
- The superintendent or her/his designee may select certain procurement opportunities for solicitation to M/WBEs to achieve the goals of this regulation. The procurement document will identify these opportunities as "Designated for Disadvantaged Business Solicitation".

The reduction of projects will be based on the following criteria:

- The complexity of the project's design and the ease of breaking it into smaller components without affecting overall project quality;
- The availability of M/WBEs that might participate, especially within a specific specialty or trade;
- The extent to which the stated goals of this regulation are being met within any annual period; and
- The potential cost/benefit of reducing the project.

Procurements for projects and/or services with potential contract or contracts in aggregate for one scope of work offering of up to \$15,000 are exempt from this regulation. However, the District's Purchasing Department will monitor and keep written records of these exemptions, and the superintendent will report them to the Board quarterly.

M/WBE Opportunity Notice:

Through its advertisements, contract documents, and boilerplate specifications, the District will provide its M/WBE regulation to all potential contracting entities prior to the solicitation of actual price quotes on any opportunity. Every responding vendor's proposed price quote and offering must include the name and identification of any and all M/WBE contractors, subcontractors, and suppliers as part of the vendor's bid. When this documentation is missing from the vendor's bid, the District's Purchasing Department will deem the bid to be materially insufficient and disqualify the vendor's bid from further consideration.

Subcontracting to a Governmental Body:

As defined in Article 21, 11-35-5230(B) of the State Consolidated Procurement Code, firms with State contracts that subcontract with minority firms shall be eligible for an income tax credit equal to four percent (4%) of the payments for minority subcontractors for work pursuant to State contract. To be eligible for the four percent (4%) income tax credit, subcontracting firms must be certified by the Small and Minority Business Assistance Office as a minority firm. Information pertaining to the income tax credit can be obtained from the South Carolina Tax Commission or the Small and Minority Business Assistance Office.

District Assistance to Minority/Women and Small Business Enterprises:

To assist in the accomplishment of its M/WBE goals, the District will make available various resources as follows:

- **Referral Service:** The District will maintain a reference file of federal, state, and other organizations that provide assistance and business training to small and minority business. This reference file will be made available to minority firms upon request.
- **Split Projects:** The District will provide minority subcontractors an opportunity to bid on renovation projects that are coordinated by the District's Maintenance Department. The District will invite M/WBE firms on the District-maintained "active" list to participate in bids on projects for which the firm qualifies.
- **Contractor and Subcontractor Requirements:** The District shall provide clear and timely instructions to contractors regarding the use of minority subcontractors. District solicitations will require all bidders to address the District's requirements regarding the use of minority

contractors and subcontractors. The District will make utilization of minority subcontractors part of the contractors' overall contract goals, and contractors will report on their use of minority subcontractors in their monthly reports to the District.

- **Education:** The District will design and present semi-annually an education program for M/WBEs that fosters awareness of the District's processes and requirements and help raise the chances of success among new potential business enterprises in District procurements.
- **Publications:** The District will notify M/WBE-related organizations of and advertise District procurements, including Capital Improvement Programs, in such a manner as to attract notice by and participation of M/WBEs. Whenever possible, the District will provide M/WBEs and M/WBE-related organizations with advance notice of upcoming projects and anticipated bid dates.

At a minimum, the District will advertise its solicitations in the following publications and sites:

- o Bluffton Today
- o The Beaufort Gazette
- o The Dodge Hill Report
- o The Gullah Sentinel
- o The Island Packet
- o The Post and Courier
- o The Savannah Morning News
- o South Carolina Business Opportunities
- o The State
- o The Black Chamber of Commerce
- o The Beaufort Chamber of Commerce
- o The Greater Hilton Head Chamber of Commerce
- o The District's Website

Reporting Requirements and "Office of Contract Compliance":

The superintendent shall semi-annually provide a written report to the Board that includes the number and dollar value of contracts and purchase orders awarded to certified, South Carolina-based M/WBEs during the prior six months.

The superintendent will establish and continuously maintain an "Office of Contract Compliance" that is responsible for the development, administration, and management of the District's M/WBE regulation.

The Office of Contract Compliance will oversee, prepare, and review all District contracts for use of best business practices, management standards, legal requirements, and risk/insurance requirements.

The "Contracting Compliance Officer" will be in charge of The Office of Contract Compliance. In addition to the duties described above, s/he will serve as the District's M/WBE Liaison Designate with responsibilities to lead, direct, and promote the District's M/WBE throughout the District.

Adopted: September 5, 2006

Revised:

Legal references:

S.C. Code of Laws, 1976, as amended:

§ 11-35-5010: Assistance to Minority Businesses

§ 11-35-5230(B): Regulations for negotiation with state minority firms.

DRAFT

C- 15 SALES CALLS TO STAFF

Purpose: To establish the superintendent's expectations for sales calls on Beaufort County School District (District) staff.

Sales representatives are not permitted to call on teachers or other school staff at District sites without authorization from the superintendent or his/her designee.

The superintendent or his/her designee may give permission to sales representatives of educational products to see teachers or other school staff at times that will not interfere with the educational program.

Adopted: July 12, 2001

Revised:

C- 16 PAYMENT PROCEDURES

Purpose: To establish the superintendent's expectations for payment of Beaufort County School District (District) obligations.

By the authority of the superintendent and at the direction of the Chief Operational Services Officer, the District's Accounts Payable and Payroll divisions of the Finance Department will receive, hold in custody, and expend all funds as directed by the Board of Education (Board).

The District will make all payment for goods, services, and employee payroll only under the following conditions:

- Against submitted invoices, properly supported by authorized District purchase orders;
- Against properly submitted vouchers covering authorized expenses;
- According to the salary schedules or salaries set by the Board.

Adopted: July 12, 2001

Revised:

Legal references:

S. C. Code, 1976, as amended:

- § 11-1-40: Unlawful to contract in excess of appropriate amount and to divert current funds for payment of prior obligations.
- § 59-10-80: All employment and purchase contracts require board approval.
- § 59-19-290: All contracts in excess of apportioned funds are void.

C-17 SALARY DEDUCTIONS

Purpose: To establish the basic structure for deductions from Beaufort County School District (District) employees' salaries.

All deductions from salary, except for deductions required by law, are subject to approval by the superintendent and are voluntary on the part of the individual employee. The District requires that voluntary deductions be authorized in writing by the employee on a form supplied by the District.

Deductions are required by law:

- Social Security (FICA)
- State and Federal income taxes
- State Retirement contributions

Deductions allowed by law and approved by the superintendent:

- Individual and extended family benefits for health insurance
- tax sheltered annuity plans which meet Board of Education established criteria
- payments to employee credit unions
- state-authorized group survivor monthly income insurance programs and term life insurance.

The superintendent will consider approving deductions for charitable organizations only after each organization submits evidence that it has a current 501(c) (3) classification with the Internal Revenue Service.

The District will not make deductions for any organization which is chartered by Section 501(c) (4), (5), or (6) of Title 26 U.S. Code.

The District will not make deductions for any organization whose parent or subsidiary organization fails to meet the requirements herein.

The District will not make any deductions if the proceeds of the deduction would be for the benefit of a labor organization.

Adopted: July 12, 2001

Revised:

Legal references:

S. C. Code, 1976, as amended:

- § 8-11-91: Deductions for charitable contributions.
- § 8-11-92: Qualifying criteria for charitable organizations.
- § 8-11-93: Minimum level of employee participation required (Lesser of 10% or 200 employees).
- § 8-11-98: Deductions for payment to credit union.

C-18 EXPENSE AUTHORIZATION/REIMBURSEMENT

Purpose: To establish the basic structure for authorizing and reimbursing expenses for Beaufort County School District (District) employees.

The District will reimburse members of the Board of Education (Board) and District employees for work-related expenses incurred during approved travel for the District, such as approved attendance at conferences and other authorized expenses related to the performance of their official duties. The District will not reimburse Board members or District employees for any personal expenses incurred during such travel.

The District will reimburse Board members and District employees for incurred expenses and travel according to the procedures outlined in the Finance Department Policies and Procedures Manual.

Employee Travel:

- In-District:
 - District employee travel within the District must be approved by the employee's immediate supervisor and will be reimbursed at the District's standard mileage rates and distances.
 - The District will not reimburse employees for *per diem* and lodging during travel within the District, unless the employee is an official member of the committee conducting the event. The committee chairperson must approve the *per diem*, and the event must require the employee's arrival at the event before 7am and departure after 7pm to qualify for *per diem* and lodging.
- Out-of-District:
 - All work-related District employee travel outside the District requires prior submission of the District's Travel Request Form, including quotes for all travel, *per diem*, lodging expenses, and fees expected to be incurred. The employee must have prior approval by her/his immediate supervisor for out-of-District travel.
 - District employees traveling to multiple out-of-District locations during the same travel occurrence shall be governed by the same rules as for travel to separate locations.
 - Reimbursement for out-of-District travel (driving) shall not exceed the cost of flying to the same designation.
 - The District will pay, in advance, *per diem* for meals based on the work-related travel period and the event agenda. The District will pay *per diem* only for those meals not included in the event agenda and during the work-related travel period. In order to receive *per diem*, employees must attach a copy of the event agenda with her/his travel request.
- Mileage:
 - The District's mileage rate is established by the superintendent.

Adopted: July 12, 2001
Revised:

C-19 CASH IN SCHOOL BUILDINGS

Purpose: To establish the superintendent's expectations for dealing with cash in Beaufort County School District (District) school buildings.

School principals may not permit money to be kept in her/his school overnight under any circumstances.

The superintendent requires all principals to deposit all school monies on a daily basis, at the end of each school day or after a school event. When necessary in order to comply with this administrative rule, the principal shall make arrangements with a local bank for night depository privilege. S/he will use these facilities as events dictate.

Principals who do not abide by this policy shall be personally responsible for any loss incurred as a result of her/his failure to make a timely deposit and may be subject to further disciplinary action.

Adopted: July 12, 2001

Revised:

C-20 SCHOOL PROPERTIES DISPOSITION

Purpose: To establish the basic structure for disposal of Beaufort County School District (District) property that is no longer needed.

The superintendent will advise the Beaufort County Board of Education (Board) when certain property is no longer needed for public school purposes and recommend the disposition of such property. That recommendation may be to sell or lease school property, real or personal.

Real Property:

The District shall consider for sale or other advantageous disposition any real property owned by the District that is no longer being used for school purposes. Any disposal of District real property shall be in strict accordance with both state law and the District's *Fixed Assets Accounting Procedures* (available in the District's Finance Office and on the District's website). The District's intention is to dispose of real property at market value. The superintendent shall apply all proceeds of any such sale of real property as directed by the Board of Education.

The State Board of Education must approve, in advance and in writing, the reassignment or disposal of parcels of land purchased after 1952 with any state funds.

Personal Property:

Any disposal of District personal property shall be in strict accordance with all applicable state and federal laws and regulations and with the District's *Fixed Assets Accounting Procedures*. When permitted by law, assets being disposed of must be sold in a public auction. The superintendent will apply proceeds of any such sale or lease to the District's General or Capital Projects Fund.

Adopted: July 12, 2001

Revised:

Legal references:

SC. Code, 1976, as amended:

- § 59-19-190: Purchase of land by trustees; reassignment or disposal of land purchased with state funds.
- § 59-19-250: Sale or lease of school property by trustees.

C-22 Transportation Services

Purpose: To establish the superintendent's expectations for the transportation services in the Beaufort County School District (District).

As required by state law, the District provides transportation for all eligible public school students within the District. In addition, the District may purchase and/or lease and maintain fleet vehicles necessary to accomplish its routine business tasks.

The superintendent assigns management oversight responsibility for the District's transportation services, purchases, and contracts to the District's Chief Operational Services Officer (COSO).

Student Transportation:

The South Carolina Department of Education (SDE) has oversight over the transportation of students in public schools. The District shall comply with all SDE rules and regulations regarding student transportation and cooperate with the SDE in all matters pertaining to the safe operation of school buses, the assignment of bus routes and stops, and the entitlement of students to ride on State and/or District-provided school buses.

Under the provisions of its Procurement Code, the District subcontracts with a private student transportation management company to operate its student transportation system as well as to provide additional equipment and services the District deems necessary, desirable, and/or appropriate.

The transportation of students and/or District personnel must comply with the regulations and requirements of the District's Fleet Safety Program in C-22R of the District Administrative Rules and Procedures.

Contractor personnel, District staff, and any other persons who are authorized to operate school busses used in the transportation of students and/or District staff are also subject to the District regulations and requirements in C-22R.

Fleet Vehicles:

Purchase and/or lease agreements for fleet vehicles the District uses in its routine business operations are governed by the District's Procurement Code.

Contractor personnel, District staff, and any other persons who are authorized to operate District-owned fleet vehicles are subject to the District regulations and requirements of the District's Fleet Safety Program in C-22R of the District Administrative Rules and Procedures.

Adopted:

Revised:

C-22R FLEET SAFETY PROGRAM

General standard

Beaufort County School District (District) school personnel and contractors may be authorized to operate District vehicles for the purpose of conducting District business, provided the employee driver is at least 18 years old, has an appropriate and valid U.S. driver's license for the vehicle being driven, has reasonable experience driving the type of vehicle being used, could reasonably be expected to operate the vehicle in a safe and prudent manner, and meets the District's fleet safety program requirements as set forth below.

Compliance with South Carolina law and the District fleet safety program is required for any eligible driver to be authorized to use a District vehicle. Operations is authorized to deny a vehicle to anyone if there is any reason the pool vehicle may not be operated safely. Individual departments may impose additional standards, restrictions or driver education or training requirements. This fleet safety program is in addition to any requirements, standards, operating restrictions or suspensions imposed by law.

Driving record reviews

The District will periodically review the past driving record of current and prospective District employees, volunteers or agents who use the District's vehicles or other vehicles to conduct District business.

Out of state licenses

Unless the District has an employee who resides in the state of Georgia, the District requires that all employees have a valid driver's license for the state of South Carolina. If the employee has resided in South Carolina for less than three years, the employee will need to supply the District with a certified copy of his/her driving record from that state.

Record review

If any one of the following applies, the driver's past three-year driving record will be reviewed to determine compliance.

- Driver is job applicant or an employee where driving is a condition of employment.
- Driver is requisitioning a District pool vehicle or will be carrying passengers or has had an "at fault" accident in the last year.
- Driver has been convicted of a moving traffic violation or driving under the influence of alcohol or drugs or license has been revoked, barred, denied or suspended.
- Driver has routine access to vehicles for conducting District business.

The District reserves the right to review the driving record of any driver to determine driver eligibility related to any vehicle (owned, non-owned, rented, borrowed, leased or any other vehicle) for which the District may be held legally liable.

Risk Management will review driving records annually or semi-annually as required by this policy and when requested by departments on a case-by-case basis. The driving record reviews will be conducted as permitted by the provisions of the Federal Driver's Privacy Protection Act that regulates the use and disclosure of personal information from driver records. Access to the driving record is restricted to assigned contractors of risk management, operations, the individual employee, his/her department

supervisor(s) and their superiors, operations department members and other District contractors who have an authorized and legitimate need for the information in the normal course of business.

An employee who holds a position in which driving is a condition of employment may be terminated if the driving record does not comply with the requirements of the fleet safety program.

Driving standards

Driving privileges will be denied if the driver's past three-year driving record indicates any of the following.

- three or more "at fault" accidents or three or more moving violations or a combination of three or more accidents and violations
- conviction of reckless driving; conviction of driving with a suspended, denied, revoked or barred license; conviction of hit and run; or conviction of leaving the scene
- license suspension, license denial, license revocation or license bar
- conviction of driving while under the influence of alcohol or drugs or conviction of vehicular homicide or conviction of any driving offense punishable as a felony

Bus drivers

District employees who drive school buses will be held accountable to the District transportation contractor (see Appendix A for that program).

For purposes of reviewing driver records for eligibility or corrective action, moving violations will not include violations for the following.

- failure to use safety belts
- parking violations
- past convictions, suspensions or revocations related to civil or criminal actions unrelated to driving or vehicle operation
- speeding violations of 10 miles per hour or less over the legal speed limit only in speed zones where the legal speed limit is between 34 miles per hour and 56 miles per hour

Authorized drivers

Authorized drivers are District employees and those officially authorized volunteers and agents. Volunteers or agents may be considered employees for vehicle liability coverage, provided the vehicle use is solely for the benefit of the District or to conduct District business and the volunteer or agent is officially authorized to drive by the head of the department or the Risk Management. Contractors are not eligible and may not use District vehicles without written authorization from risk management. Refer questions regarding eligibility or use by volunteers or agents to risk management or operations.

Authorized drivers are not consultants or vendors, students or school personnel/contractors visiting from other schools, visiting artists or speakers, members of special event groups, government representatives, members of visiting athletic teams, members of visiting student groups or members of visiting community organizations.

Vehicle pick-up at the DESC - display of license, authorized drivers only

A pool vehicle will not be released to any person other than an authorized, approved driver of the requisitioning department. A pool vehicle will not be released to any person unless the person presents a

valid U.S. driver's license that reasonably identifies that person. International driver's licenses will not be accepted.

Driver record review process

Departments, schools and agents are required to submit a list of drivers with license information to Risk Management annually for those drivers who will have routine access to departmental vehicles. The driving records will be reviewed to determine compliance with the fleet safety driving standards and the department head will be provided with a list of approved drivers. To add employees to their approved driver list, departments should submit new names and driver license information to Risk Management for review and approval, prior to allowing new employees to drive departmental vehicles.

Pool vehicles

Risk Management will review the driving record of individuals listed on the requisition as drivers or alternate drivers prior to release of the vehicle. Drivers may be required to sign a statement certifying compliance with the District fleet safety program requirements regarding licensing, convictions, moving violations or accidents.

Vehicle operators/employed to drive

Where driving is a condition of, or a substantial part of employment duties (bus drivers, couriers, maintenance, food service, custodial, operations or 50 percent of time is spent driving), the employee's past three-year driving record will be reviewed for compliance with the driving standards at least annually.

Job applicants

Job applicants must comply with the fleet safety program standards prior to employment and are required to supply the District with a current copy of their three-year driving history from the department of motor vehicles. Individual departments should forward driver record information with a request for review to risk management. The individual department may require more frequent record review and may impose more restrictive standards or require other education or training requirements, other than those provided under this fleet safety program, as a condition of employment.

Authorized passengers

Authorized passengers include those in official District-sponsored or authorized transportation programs and District employees, agents or volunteers while on authorized District business.

Authorized passengers may also include persons who are on campus at the District's request, for example, for potential employment at the District, to provide contracted services or for participation in a District event/program. Other examples of authorized passengers include visiting school personnel/contractors, visiting artists or speakers, government representatives, members of visiting athletic teams or community organizations. All other passengers are prohibited from traveling in District vehicles.

Examples of unauthorized passengers are an employee's spouse, children or other family members; students, friends or neighbors of a District employee driver; or members of the general public.

Student transportation in private vehicles

District employees are prohibited from transporting students in their private vehicles. However, the District recognizes that there are times in which private vehicles are needed by social workers, principals, assistant principals and athletic directors to transport students. The District directs that such

transportation services will only be utilized in emergency situations as authorized by the principal. Otherwise, proper student transportation, i.e. buses, will be used.

In certain instances that further the educational mission of the District, other staff may be authorized to transport students. When private vehicles are to be used such vehicles will be chosen in advance of the anticipated usage. A trip request authorized by the principal must be submitted at least two weeks prior to travel. The following guidelines will be adhered to.

- The driver of a vehicle is restricted to the designated employee.
- The number of students transported will be limited to the recommended capacity of the vehicle. Seat belts will be available for every passenger and each occupant of the vehicle will buckle with the appropriate seat belt.
- A photocopy of a valid driver's license of the driver(s) and insurance card of the vehicle will be submitted to school personnel by the intended driver. A minimum insurance coverage of \$25,000 each person, \$50,000 each occurrence bodily injury and \$25,000 property damage will be required coverage for any personal vehicles used to transport students. Appropriate documentation will be made that the driver of the vehicle and the vehicle's owner are aware that their insurance will be the first line of defense in the event of an accident.

Prior to the use of the vehicle, the following background information about the driver and/or owner of the vehicle will be obtained.

- name, address, phone, trip destination, reason for trip, times of departure and return
- driver of the vehicle; owner's name, if different from driver
- number of students to be transported
- other passengers besides students/driver
- verification of written permission for all students to travel with the group
- type, age and condition of the vehicle(s) to be driven
- verification by signature that the owner of the vehicle gives consent for intended usage of the vehicle
- information regarding the owner's vehicle insurance coverage
- driver's motor vehicle records; driver will give the school board permission to evaluate the driver(s) motor vehicle record for driving problems, citations or DWI/DUI incidences.

It is strongly recommended that a visual inspection of the vehicle(s) to be used in the activity be completed. The following items should be examined.

- Are there seat belts for every occupant?
- Does the vehicle seem to be in good condition and proper working order?
- Do the tail lights and head lights operate properly?
- Are the tires in good condition (not bald, dry rotted, damaged, etc.)?
- Any other concerns which may be revealed during the inspection should be documented.

Under no circumstances will students be allowed to ride in the back of a pickup truck.

Approved uses

District vehicles may be used solely for the purpose of conducting District business. Examples of approved uses include conducting departmental business; business errands; educational field trips when supervised and accompanied by school personnel or a District employee on site; District-related, sponsored or approved conferences/meetings/events; and use by volunteers in programs sponsored by, directed by or for the sole benefit of the District.

Personal liability

In compliance with South Carolina law and District policy, the fleet safety program strictly prohibits the use of District vehicles for personal purposes, vacations or trips or to conduct personal business or for transportation of non-District passengers (except as authorized) or use by family members. Any employee, student or other person who uses District vehicles for personal transportation or other personal purposes is personally liable for any accident which occurs during such personal use.

Accidents

Corrective action, penalties and restrictions

An "at-fault" accident is an accident which results in bodily injury or property damage of more than \$500 (all parties combined) in which the employee driver was more than 50 percent responsible, as determined by the department of risk management. In making the determination of fault, all relevant information including information provided by the adjusting agency, the District driver, others involved in the accident, information provided by witnesses to the accident and information contained in any investigating officer's reports will be considered. If an employee is determined to be at fault they will be responsible for paying 50 percent of the insurance deductible (not to exceed \$500.)

- **After any "at-fault" accident** involving a District vehicle, the driver's record will be reviewed for compliance with the driving standards.
- **Second "at-fault" accident** - Drivers who have a second "at-fault" accident in a District vehicle in a two-year period are prohibited from driving District vehicles for three months following the accident.
- **Third "at-fault" accident** - Drivers who have three "at fault" accidents in a District vehicle in a three-year period are prohibited from driving District vehicles for one year following the accident.
- **Fourth "at-fault" accident** - Drivers who have four or more "at-fault" accidents while using a District vehicle in a five-year period will be permanently restricted from driving District vehicles.

Suspension of privilege to drive

In the event of an "at-fault" accident where there is substantial property damage (\$2,000 or more) or injury or serious criminal violation, driving privileges may be immediately suspended for the use of District vehicles. The employee and his/her department will be notified of the dates and terms of suspension.

Driving privileges will be suspended pending the outcome of a serious criminal charge involving a vehicle, a charge for driving under the influence of alcohol or drugs, charge of vehicular homicide or any charge punishable as a felony. Other restrictions may be applied, up to and including prohibition from transporting passengers or using any vehicle (private, rented or state-owned) on District business, if there is clear evidence of unsafe driving behavior, such as extreme violations of motor vehicle laws, that would affect the safety, health and welfare of the driver, passengers or the general public.

Appeals

Employees or departments may appeal vehicle use restrictions to the operations department. A written request for appeal should include information on any special circumstances that should be considered. The request should be forwarded to Risk Management, 2900 Mink Point Blvd., Beaufort SC 29902. The Operations Department may reinstate driving privileges or vehicle use, with or without contingent conditions; if it is determined that safe and prudent operating standards will be met.

Probation and reinstatement

Employees who would otherwise lose their driving privileges due to non-compliance may be approved for probationary reinstatement of driving privileges by the operations department. Probationary reinstatement will require successful completion of remedial driver training and satisfaction of a clean probationary period (60 days to one year) during which the employee may not have any "at-fault" accident or conviction of a driving violation covered by this program. If the conditions set by the operations department are not met, the probationary reinstatement status will be revoked and the original penalty, restriction or corrective action will resume.

Defensive driver course

Drivers who are required to complete remedial driver training must complete a defensive driver course or training, as required by the District fleet safety. Contact Risk Management for information and to arrange for the training.

Passenger van driver training/experience requirements

Before driving a District 12 to 15 passenger van, a driver will be required to possess a valid commercial driver's license.

Rented, borrowed or private vehicles - reimbursement of mileage

The District reserves the right to deny personal mileage reimbursement to any employee or driver who does not meet the criteria required under the fleet safety program.

Required reporting of accidents/violations

A District driver must promptly report to his/her department supervisor all accidents, moving violations or other vehicle citations that occur while the employee is conducting District business. The driver's supervisor must immediately forward the information to risk management. Failure to report accidents, convictions and violations as required may result in the loss of privilege to use District vehicles and disciplinary action.

Hit and run and vandalism are criminal incidents and must be reported to police.

Failure to report an accident or incident of damage as required will be considered in assessing fault to a driver and may result in loss of vehicle, restricted use or assessment of repair costs or insurance deductibles to the department, up to \$500.

Misuse of vehicles

All drivers and departments are expected to properly safeguard the District's vehicles and use them in accordance with District policy. If it is determined that a vehicle is being misused or is at substantially higher risk of theft or damage due to a lack of reasonable precautions by the driver or department, risk management will notify the department. If corrective action is not taken, the department may be required to forfeit use of the vehicle and return it to operations.

In the event any District vehicle is stolen or damaged from misuse or failing to take reasonable safety precautions, is subjected to intentional damage or is allowed to be used in violation of District policy, the driver and or the department may be prohibited from further use of District vehicles and the department will be assessed for actual damage and any associated administrative and remedial costs of up to \$500.

Inspection, service and maintenance policy

District vehicles licensed for operation on public roads are required to be serviced and maintained in accordance with risk management guidelines. Every vehicle must undergo an annual inspection by first vehicle services.

The annual vehicle inspection will focus on areas of the vehicle that directly affect its safe operation including steering, tires, brakes, glass, lights, emissions system and horn. The inspector will provide a written, signed report of the areas/equipment /items inspected, including the date, name of facility and inspector, vehicle make/model and identification number, mileage and notations of operating deficiencies. Provided the vehicle has no operating deficiencies, it will be deemed to have passed the inspection and may be returned to normal usage. Correction of any operating deficiency must be completed within seven calendar days of the inspection. Repairs are to be performed by maintenance or as otherwise approved in this policy. After correction of deficiencies, the vehicle must pass re-inspection.

Risk Management guidelines for vehicle service and maintenance include complying with manufacturer's service recommendations; using recommended types of gasoline; maintaining proper fluid levels (oil, antifreeze coolant, brake and transmission, etc.); and ensuring proper tire pressure, working signals, lights (headlamps, turn-signal lights, tail lights, brake lights, etc.), brakes and other vehicle safety items.

Failure to comply with the service, maintenance and inspection requirements of this program may result in suspension of driving privileges, increased insurance charges and/or loss of the vehicle.

Miscellaneous policies

Seat belt use

All occupants of District vehicles are required to comply with applicable state of South Carolina motor vehicle laws, including laws that require occupants of a vehicle's front seat(s) to use seat belts. In addition, District policy requires mandatory use of seat belts by all occupants of District 12 and 15-passenger vans.

Cell phone use

Cell phones are made available for business use in selected District vehicles. Although recognizing that circumstances will not always permit strict adherence, it is recommended that the District driver safely stop and park the vehicle to use a cell phone.

Towing policy

Due to special equipment and skill required, towing of a trailer or other equipment with a District vehicle is strictly prohibited unless prior written permission is granted by and obtained from risk management.

Long distance driving guidelines

The District fleet safety program guidelines for groups for long distance driving are as follows.

- In those instances when only one authorized driver is driving long distance (four or more hours of total driving time), the driver is required to take a 30-minute break every four hours. The driver is not to drive for more than a total of 10 hours during a 24-hour period.
- In those instances where a group is driving long distance (e.g., more than one employee traveling together to a business meeting or members of a District-recognized student organization traveling to an approved conference), at least two individuals are required to be designated drivers.

Drivers are required to rotate driving duties at least once every two-hour period and take a minimum one-hour break every six hours for all drivers and occupants of the entire vehicle. Any one driver is not to drive for more than a total of 10 hours during a 24-hour period.

- The above guidelines assume good driving conditions regarding road, weather, visibility and other factors. In the event of adverse weather or other factors that may affect the ability to drive safely, first determine if the planned travel route may be driven safely (call the highway patrol). If it is determined to be safe to drive with appropriate precautions, the above driving limitations should be modified accordingly to account for the increased driving times.

All maintenance, custodial and food service vehicles (with the exception of on-call personnel) will be returned each evening to the DESC and parked within the fenced area.

Issued 1/1/07

C-23 FACILITIES USE

Purpose: To establish the basic structure for the use of Beaufort County School District (District) facilities by public and private organizations.

It is the intention of the Beaufort County Board of Education (Board) and, therefore the policy of the District, to allow for the reasonable use of certain District facilities by public and private organizations. Such use shall comply with the Facilities Use Guidelines in C-23R and the Facility Use Fee Schedule in C-23E of the District's Administrative Rules and Procedures.

This policy does not apply to schools or school sponsored organizations such as school clubs and societies.

The superintendent has delegated management authority of the use of District facilities by public and private organizations to the Chief Operational Services Officer or her/his designee.

Adopted: March 17, 2009
Revised:

C-23E FACILITIES USE FEE SCHEDULE

The following groups may use Beaufort County School District (District) facilities without charge for meetings, recreational activities and fundraising activities that benefit students of the District.

- school clubs/teams/organizations/band
- parent/teacher organizations
- school improvement council
- employee associations (e.g., BCEA)

The following groups may use District facilities; however, fees may apply to the cover cost of operations (staff, administrative costs, custodial and power). Insurance certificates naming Beaufort County School District as an "Additional Named Insured" will be required.

- clubs and organizations with 501(c)(3) status
- governmental agencies

The following groups may use District facilities; however, fees will apply to the cover cost of operations (staff, administrative costs, custodial and power). Insurance certificates naming Beaufort County School District as an "Additional Named Insured" will be required.

- businesses
- business organizations
- colleges
- community centers/organizations
- political organizations
- religious organizations

All rental/usage fees must be paid in advance to the District Finance Office, Attention: Accounts Receivable. District employees may not accept payment directly from the renting entity.

Rental/Usage Fees:

- Facility use 4-hour costs include the following:

Administrative:	\$25.00
Facility Use:	15.00
Custodial:	75.00
Facility 4-hour Cost:	\$115.00

- Theatre/Performing Arts Center (PAC) 4-hour costs include the following:

Administrative:	\$25.00
Theatre Manager:	240.00
Stage Hands:	200.00
Facility Use:	50.00
Custodial:	75.00
Theatre/PAC 4-hour Cost:	\$590.00

The District, principal and/or building administrator reserve the right to require the renting entity to provide approved security services.

A security deposit will be required for entities using District facilities. Custodial services are required as a condition of any rental taking place after regular school hours.

- **Room/Space Rental – 1 to 4 Hours:**

Gymnasium:	\$115.00
Locker Room:	\$115.00
Multi-purpose Room:	\$115.00
Cafeteria*:	\$115.00
Kitchen*:	\$115.00
Other Room/Space:	TBD

Additional rental time after the initial one to four hour period will be charged at \$XX.00/hour.

*Kitchen use is not included in the rental of the cafeteria. Cafeteria use is not included in the rental of the kitchen.

- **Theatre/Performing Arts Center Rental:**

(Beaufort High School, Bluffton High School, Battery Creek High School and Hilton Head High School)

Basic Performance (4 hours):	\$590.00
Rehearsal (4 hours):	\$90.00
Dress Rehearsal:	\$100.00 per hour
Additional Performance Time:	\$98.00 per hour

Additional fees:

Additional equipment may be available for rent. The theatre manager will determine if events merit services above and beyond the basic rental package.

Advanced Technical Assistance:	\$25.00 per hour
Production Staff:	\$10.00 per hour

- **Athletic Fields:**

Track/Soccer:	\$100.00
Baseball/Softball:	\$100.00
District Stadium:	\$100.00
Football Field:	\$100.00
Practice Field:	\$100.00

Athletic field rental fees are for a four-hour period. Additional rental time after the initial period will be charged at \$XX.00/hour.

NOTE: Athletic field costs are determined using the current grounds management contract (field grooming costs, § 3.12.4, pg.49).

Adopted: September 19, 2006
Revised: March 17, 2009;

C-23R FACILITIES USE GUIDELINES

As it is the expressed intent of the Board of Education (Board), it is also the policy of the Beaufort County School District (District) to allow the reasonable use of certain facilities by public and private organizations provided the following guidelines are adhered to.

- Such use will not interfere with a school's primary responsibility.
- Such use will not jeopardize the person or property of the District, the user or any invitee.
- Such use will not materially burden the District with additional costs or risk of liability.
- The organization pays the established facility use fee pursuant to the established facility use fee schedule.

This policy does not apply to schools or school sponsored organizations such as school clubs and societies (Chess Club, National Honor Society, yearbook, etc.); athletic teams; student visual and performing arts groups (band, drama club, etc.); and other student-oriented groups and activities put on by these organizations (performances, fundraisers, etc.)

Priority of use:

The priority of use will be as follows.

- school and school-sponsored groups and organizations
- school-affiliated organizations, including PTO, booster club organizations and employee organizations
- youth-oriented community organizations where 80 percent of the active members are enrolled at the District facility that the group seeks to use
- departments or agencies of local government
- non-profit organizations related to educational, religious, political and cultural interests of the citizens of Beaufort County

Schools, school-sponsored and school-affiliated organizations:

School, school-sponsored and school-affiliated organizations are exempt from all facility use fees.

Non-profit organizations:

Groups and organizations whose activities are open to the general public and whose net receipts, fees and contributions are expended for the welfare of the students of the District, for charitable purposes or for other non-profit activities may be charged a facility use fee. Such fee will be at least equal to, but will not exceed, direct costs. The superintendent or his/her designee must approve any deviation from the fee schedule.

All other organizations:

All other organizations are subject to a schedule of charges established by the District that will be calculated to cover the cost of operation for the facility.

Authority:

The school principal is responsible for the coordination and enforcement of Board policies and procedures and the District facility use policy at his/her school.

The school building administrator determines the appropriateness of granting the use of the facility to the requesting group.

The final decision on any use will be with the superintendent.

Insurance and liability:

Any group or organization other than school, school sponsored and school affiliated organizations requesting to use a District facility must provide proof of general liability insurance with coverage of not less than \$1,000,000 per incident that specifically lists the District as an "Additional Named Insured" prior to any use of District facilities.

Indemnification:

The applicant must agree to hold the District, its Board, the individual members thereof and all District officers, agents and employees free and harmless from any loss, damage, liability, cost or expense that may arise out of or be caused in any way by the applicant's use of District facilities. (Please refer to contract for specific language.)

Facility use:

The following requirements apply to the use of any District facility.

- Only public use spaces are available for rental. These include gymnasiums, cafeterias and multi-purpose rooms. Unless granted an exception by the superintendent for activities directly related to the education of students attending District schools, classrooms are not available for use or rent.
- An approved application may be revoked with reasonable notice when school facilities are needed for school purposes.
- No facility use permit will be granted for a period exceeding one year.
- User agrees not to discriminate against anyone on any basis pursuant to state and federal law.
- Use of the school telephones is prohibited except in the case of an emergency (such as police, fire, ambulance, etc.).
- Membership of youth oriented groups must be made up of at least 80 percent Beaufort County School District students.
- Groups desiring to cancel a prescheduled use of a facility must notify the school in writing no less than 48 hours prior to the scheduled use. Cancellation notices given with less than 48 hours prior notice will result in forfeiture of all prepaid charges except for any property damage deposit on equipment use.
- All individuals and groups using District facilities, including buildings, athletic fields, tracks and tennis courts, do so at their own risk.

Prohibited activities:

The following activities are strictly prohibited in all facilities otherwise available for use.

- Activities or affairs that require heavy maintenance or crowd control in the sole opinion of the superintendent or his/her designee.
- Daycare, after school care or other child supervision activities provided by outside organizations without a written contract approved by the Board.
- Alcoholic, narcotics and weapons. Possession or use of alcoholic beverages, narcotics or weapons on school property is illegal and prohibited. Any person under the influence of alcohol or narcotics will be denied participation in any activity. Violation of this regulation is justification for immediate termination of the event and to deny future use of school facilities. (The weapons prohibition does not apply to duly authorized law enforcement officials.)
- Smoking, tobacco products. Smoking or the use of tobacco products is not allowed on school District property. This includes school buildings and grounds, even when school is not in session. Authorized agents for the group using school District property are responsible for enforcing this policy.
- Overnight use unless prior written approval from the superintendent is obtained at least 10 days before the overnight use of the facilities is scheduled.
- Long-term use of a facility other than by school, school sponsored and school affiliated organizations without a written contract approved by the board of education. The District may enter into an agreement for the shared use of facilities if the District determines that such an agreement will benefit both its students and the citizens of Beaufort County. If the District approves the long-term use of a facility by an agency or department of local government, the terms of that long-term use will be negotiated and set forth in writing.

Security:

Appropriate security and supervision as determined by the District, principal or building administrator is required for all activities held in District facilities. The building administrator is authorized to require security and supervision. If this requires the presence of law enforcement officers or other security, the group or organization using the District facility will be required to pay any associated cost.

Application required:

Any group or organization, other than school, school-sponsored and school-affiliated organizations, requesting the use of District facilities must fully complete and submit the District facility use agreement.

School, school sponsored and school affiliated organizations will follow the internal procedure established by the principal or building administrator of the facility to be used.

Facility use agreement:

Upon approval of an application, the applicant must sign the facilities use agreement. Any group or organization using District facilities must strictly adhere to the terms of the facility use agreement. All groups and organizations must adhere to all District policies at all times when using District facilities.

Access:

School keys and school access/security codes must remain in the possession of authorized school District employees at all times. Buildings will be opened, attended and closed by an authorized employee of the District. Events with greater than 100 people in attendance must have a building administrator present at all times.

Custodial services:

The presence of custodial staff is required when outside groups or organizations use District facilities during non-school hours. When custodial services are required after regular school hours, the user group or organization must pay the established fee for custodial services (including any overtime), as outlined in the schedule of charges. Custodial fees may include set-up and cleanup as needed for an event.

Kitchen use/catering:

The use of a kitchen is not included when a District facility is rented. If an organization wishes to use a kitchen, an additional staffing fee will be charged to cover the costs of providing a District food service staff member. Food may not be prepared at a school kitchen unless one or more District food service personnel are employed to supervise the preparation. The group or organization must pay the hourly rate, including any overtime, for each food service personnel utilized for this purpose.

Facilities set-up:

The application should clearly state what set up is required for the facility (i.e. "floor clear, 50 chairs set-up against walls, three tables available but not set up" etc.). Unless otherwise agreed to in writing, the applicant is responsible for any set up and should request sufficient time in the application to cover set-up, takedown, etc., as necessary.

Handling of fees:

With the exception of the administrative fee, facility use fees are not to be retained by the individual school. All fees collected are to be forwarded to the District Finance Office as an "account receivable" and should be made payable to the Beaufort County School District. One-half of the fees due under the facilities use agreement will be due at the signing of the contract. The remainder of the fee (including custodial costs) must be paid at least 10 days before the scheduled time for use.

Community organizations using the facilities will be required to pay a security deposit of \$200.

Damage to facilities:

Users are responsible for the condition in which they leave the facilities. The applicant must pay for any breakage, damage or loss of District property. The cost of such breakage, damage or loss will be determined by the director of operations in cooperation with the building administrator and will be billed to user as soon as practicable. Failure of the organization to meet this obligation within two weeks of date of billing will be cause for cancellation of the organization's privileges. The District reserves the right to take all appropriate measures, including legal action, to collect all fees and charges for damages.

Athletic facilities:

All athletic facilities are closed except to those groups or individuals that apply for and receive an Athletic Field Use Permit (AFP). Athletic field use permits are available at the front office of each school during normal business hours (M-F, 8:00 a.m. - 3:30 p.m.). Groups authorized to use District athletic fields must

have their AFP with them while using the athletic field. Using District athletic fields without a properly issued AFP will be considered trespassing. An AFP may be revoked at any time for any reason at the sole discretion of the building administrator or athletic director.

Use of school playing fields is not permitted while it is raining, if the field is wet and such activity will be harmful to the playing surface or when such conditions may present a safety hazard to users. The building administrator and the athletic director reserve the right to cancel an AFP due to weather or if other conditions arise that could result in damage to the athletic field. School tracks will be made available to community walkers during non-school hours and at the discretion of the building administrator or athletic director. No bicycles or skateboards are allowed on school tracks or stadiums.

Tennis courts:

Tennis courts are available to the public for recreational play (at no cost to the public) during non-school hours when not being used by the school. The District retains tennis court use priority at all times. No private (for fee) lessons or commercial use of District owned tennis courts are allowed. Proper shoes are required on tennis courts at all times. No skateboards or bicycles are allowed on tennis courts at any time. Court time is limited to 90 minutes if other groups are waiting.

Amendment and revocation:

These facilities use guidelines may be amended from time to time or revoked without notice. Users should check with the District office or the appropriate building administrator/athletic director to ensure full compliance with all rules and guidelines covering the facility they seek to use.

Adopted: March 17, 2009
Revised:

C-24 ANIMALS ON SCHOOL GROUNDS and IN SCHOOL BUILDINGS

Purpose: To establish the basic structure for the allowance of animals to be brought safely on to Beaufort County School District (District) grounds and into District schools.

Except when otherwise permitted by law (e.g., guide dogs for the visually impaired), animals are permitted to be brought on to District grounds and into District facilities only for instructional purposes and only under safe conditions and limited circumstances. Any such permission must be granted in advance by the school principal and shall comply with the guidelines and restrictions in C-24R of the District's Administrative Rules and Procedures.

Adopted: October 20, 2004

Revised:

C-24R ANIMALS ON SCHOOL GROUNDS and IN SCHOOL BUILDINGS

Animals should be brought on to Beaufort County School District (District) grounds and into District facilities for instructional purposes only. The purpose of bringing animals onto school grounds or into facilities is to allow students to explore the world of animals through observation and to develop empathy for other living beings through their care and feeding. With respect to these animals, the District's primary focus and responsibility is to maintain the safety and health of all children, parents/legal guardians, volunteers and staff.

Dogs, specifically:

- Dogs will be permitted in District schools **only** for educational instruction; may not stay for longer than one day; and may not be classroom pets.
- Dogs will be kept in an appropriate habitat (*i.e.*, cages or kennels) when they are not being used for educational purposes.
- Dogs are to be kept away from carpeted areas in order to minimize the transfer of allergens to the carpets and the possibility of soiling the carpets.
- If/when concerns are expressed by staff, students or parents/legal guardians, specific types of dogs will be restricted from entry onto District grounds and into District facilities. The District reserves the right to ban certain dogs if they pose a threat to the safety or comfort of staff and students.
- Dogs that display **any** aggression to students or staff will be removed from the school and **permanently** banned from returning.
- Dogs that **are** brought into District schools are required to be members of the Delta Society's Pet Partners Program. The Delta Society is a national registry that requires volunteer training and screening of animal/handler teams.
 - As part of the Delta Society's Pet Partners Program, animals are required to demonstrate adequate health checks and proof of all immunizations, skills testing and temperament testing. All pet partners have a photo identification badge that they are required to display when visiting District schools.
 - Because Delta Society pets are so carefully selected and trained, the Delta Society backs up their pet partners with a \$1 million primary liability policy. Following, is the Internet link to the Delta Society if there is interest at a District school in this program:
<http://www.deltasociety.org/petpart/pppreq.htm>.
- All dogs will have an attendant with them at all times dedicated to the animal's supervision, care and well being when in District schools.
- Dogs brought into District schools must be on a leash and/or in cages/kennels.
- Dogs will not be allowed to roam the school unsupervised.
- Dogs will remain on a leash **at all times**.

Dogs and other animals:

- Animals not allowed in the classroom are as follows:
 - hamsters
 - gerbils
 - guinea pigs
 - rats
 - mice
 - rabbits
 - turtles
 - small lizards or iguanas
 - chickens, ducks, geese, or their eggs to be hatched

However, if one of the animals on this list has completed the Delta Society Pet Partners Program, it will be granted permission to visit District schools.

- All staff must be aware of children's allergies and fears. If a child has an allergy to an animal, that animal will not be allowed in the classroom setting. If a child has a fear, appropriate measures will be taken to help the child deal with the fear.
- Animals allowed in the classroom for more than one day at a time will be limited to the following.
 - fish
 - frogs
 - hermit crabs
 - butterflies
 - non-poisonous insects
- Other animals may visit the classroom for the duration of, but not more than, one day and will be properly caged and/or maintained in a safe, healthy and sanitary manner.
- Any animal on the premises will have been vaccinated according to a licensed veterinarian's recommendations. Birds must be banded and purchased from a certified supplier.
- All animals will be kept out of rooms for napping or storage of food and food-related equipment and supplies, or for food preparation.
- No un-caged animal will be allowed in any room used by infants or toddlers or in any area used for sleeping.
- All animals and animal areas will be maintained in a healthy and sanitary condition that is safe for the animal and children.
- No animals will be transported on a school bus with children.
- When fish and pets requiring periodic care are kept in a District classroom, a plan for their care must be written and include regular cleaning of the animal's habitat. This plan must include and be monitored by a responsible person.

Any exception to this policy needs to be approved by Risk Management prior to the animal entering the school.

Adopted:
Revised:

October 20, 2004

DRAFT

C-25 KEY CONTROL

Purpose: To establish the superintendent's expectations for the control of keys providing access to Beaufort County School District (District) facilities.

The superintendent considers it to be the responsibility of the District to promote the security of its personnel and facilities by providing appropriate and controlled access to District properties through the issuance of keys.

The superintendent assigns to District Department Heads and school principals the responsibility for the safety and security of District staff and facilities within their area of responsibility; therefore, Department Heads and school principals assume the primary administrative duties for the issuance, tracking, and return/collection of keys to and from their staff and within their area. The issuance, tracking, and return/collection of keys shall be in accordance with the C-25R of the District's Administrative Rules and Procedures.

Adopted:

Revised:

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KEY TRACKING LOG

AS OF: ____/____/____

Department / School Name: _____

Department Head: _____

Designated Key Control Person: _____

List up to 12 employees below. Attach a separate sheet to list additional employees.

Employee Name	Room #	Key #	<u>Received</u> Signature/Date	<u>Returned</u> Signature/Date
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Total Number of Keys: _____

This log represents an accurate account of the distribution of keys within my area of responsibility:

Department Head	Date
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*Key numbers are stamped on the face of the key.
Enter all numbers shown on the key.

C-25R KEY CONTROL

I. Introduction:

It is the responsibility of Beaufort County School District (District) to promote the security of its staff and facilities by providing appropriate access to District properties. This regulation is designed to facilitate the issuance of keys on a need basis, to define responsibility for issuance and collection of keys, and to encourage responsible care of keys by key holders.

A. Purpose:

To Explain the procedures regarding the issuance, return, and control of keys utilized to access District facilities.

B. Scope:

Applies to all District departments and activities.

C. Policy:

- **Department Head/Principal Responsibility:** District Department Heads and school principals are responsible for the administration of key issuances and returns within their area of responsibility. The appropriate Department Head, principal, or Officer must request all new keys issued from the Maintenance Locksmith. See C-25F or the District's Administrative Rules and Procedures for a copy of the Key Request Form.
- **Key Tracking Log:** The Department Head or school principal is responsible for ensuring that a log is maintained at all times identifying the specific keys assigned to department staff. The Maintenance Locksmith will request updated versions of these logs on a periodic basis. The Key Tracking Log should be developed as shown in C-25L of the District's Administrative Rules and Procedures.
- **Loss of Keys:** When it is apparent that a key has been lost or stolen, the Department Head / Principal must notify his/her supervisor, and the Maintenance Director. The departmental Key Tracking Log should be updated to reflect the loss of the key. The Maintenance Director will discuss the situation with management to determine if rekeying is necessary.
- **Security Keys:** All keys not issued to a specific employee must be appropriately secured. A locked cabinet or safe should be utilized to secure these keys. Keys should be returned to the Maintenance Director if they are not in use for an extended period of time.
- **Audits:** The Maintenance Department will perform periodic audits as deemed necessary to verify the accuracy of logs maintained in each office area. During these audits, the Locksmith will also investigate to ensure that spare keys are properly secured. In addition, the Internal Audit staff may at their discretion perform similar audits regarding key issuance, return, and control.
- **Grand Master Keys:** Grand Master keys provide unlimited access to various District facilities; therefore, grand master keys will be tracked separately by the Maintenance Department on an individual basis. Grand Master Keys can only be issued upon the approval of the appropriate Officer. Great Grand master keys require approval prior to issuance. These keys must be returned directly to the Maintenance Department when no longer needed or when the employee is no longer employed by the District. Each employee is responsible for the use, security, and return of their Grand Master and Great Grand Master Keys.

- **Maintenance Department Responsibilities:** The Maintenance Department will be responsible for the following functions:
 - Issuance of keys to the appropriate Department Head
 - Ensuring requests for keys are properly authorized
 - Spot Audits as noted in Policy
 - Issuance and tracking of Grand Master Keys
 - Maintaining a file of all Departmental Key Tracking Logs
 - Tracking total number of keys issued to each department
- **Request for Keys:** All Department Heads or principals who need additional keys for their area of responsibility should utilize the District Key Request Form. (See Instructions for Preparation of Forms).
- **Authorization:** The following chart should be utilized to determine what approval signatures are needed with requesting keys from the Maintenance Department:

Employee Title	Type of Keys Employee May Authorize
Department Head/Principal designated	Submaster, suite, or area Office door key External door key
Departmental Officer	Departmental Master - used for more than one department Building Master (internal door master)
Superintendent	Great Grand Master

- **Transfer/Loan of Keys:** Employees are responsible for all keys issued to them and should never transfer or loan their keys to other individuals without first obtaining the approval of their Departmental Head/principal.
- **Return of Keys:** Department Heads / Principals are responsible for ensuring that keys are returned by their employees upon transfer or termination of employment with the District. Department Heads / Principals are also responsible for notifying the Maintenance Department to allow record update. Grand Master Keys should be returned to the Maintenance Department by the individual assigned to the key.
- **Key Duplication:** Key holders shall not duplicate any keys issued to them. Additional keys must be requested utilizing the District Key Request form.
- **Key Control Person:** Department Heads/principal may designate a key control person to handle administrative and tracking tasks. The Key Tracking Log should identify this employee.

D. Procedures:

- **District Key Request Form:** The District Key Request Form should be used by the appropriate Department Head/principal to request new keys, to return keys that are no longer needed, and to report lost keys to the Maintenance Department. (Please see the Instructions for Preparation of Forms).
- **Key Tracking Log:** Utilize the PDF form in this procedure to set up a key tracking log. You may also maintain this information using a software package of your choice.

II. Instructions for Preparation of District Key Request Form:

A. Purpose:

This form is used by Department Heads/principals to request new keys, to return keys no longer in used, and to provide notification of lost keys to the Maintenance Department.

B. Where to Obtain Forms:

Forms are available on the District website. You may fill out the PDF form on-line and print for signature or you may print a blank copy of the PDF form and then fill out by hand or typewriter. You may also maintain this information using a software package of your choice.

C. Where to Send Completed Forms:

Forward the District Key Request Form to the Maintenance Work Control desk. Retain a photocopy of the form for departmental records.

D. Instructions:

Information is to be completed by the Department Head / Principal. Instructions are provided only for those items requiring additional explanation.

- The Signature of the Department Head / Principal or designated Key Control person picking up the keys requested should be entered here at the time the keys are picked up at the Maintenance Department Administrative Office. The department will be notified when the keys are ready.
- The employee picking up the keys should bring an I.D. card for identification.
- Request for Keys:
 - Enter the name of the building where keys are to be used.
 - Enter the room number of the doors where keys are to be used. Specify if key request is for an exterior building door.
 - Enter the key number stamped on the key. You may leave this blank if you are requesting a key and the number is unknown.
- Authorization Signatures: Obtain appropriate approvals as indicated in Policy.

III. Instructions for Preparation for District Key Tracking Log:

A. Where to Obtain Forms:

The following options are available:

- You may fill out the PDF form on-line and print for signature, or you may print a blank copy of the PDF form and then fill out by hand or typewriter.
- You may also maintain this information using a software package of your choice.

B. Where to Send Completed Forms:

Forward the District Key Tracking Log to the Maintenance Department. Retain a photocopy of the form for departmental records.

The Maintenance Department may request updated versions of logs on a periodic basis.

C. Instructions:

Items on the form are self-explanatory; therefore, no additional instructions are necessary.

Adopted:
Revised:

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C-26 FOOD SERVICES

Purpose: To establish the superintendent's expectations for the provision and management of food services in the Beaufort County School District (District).

The District's Chief Operational Services Officer (COSO) is responsible for **management** and oversight of the District's food service operations. In strict accordance with the District's Procurement Code, the District may choose to contract for food services and food services management with an eligible vendor.

After accounting for all support and funding provided by State and Federal programs, and to the extent possible, the District's food services program shall be self-supporting. The District's Board of Education (Board) will review and approve the price of school meals to cover expenses and not generate a profit for the District.

The food services program shall provide the best meals possible for students at the minimum cost necessary to meet all State and Federal food nutrition guidelines.

The food services program will comply with all rules and regulations of the National School Lunch Program.

Adopted:

Revised:

C-27 BUILDING, GROUNDS, and PROPERTY MANAGEMENT and MAINTENANCE

Purpose: To establish the superintendent's expectations for the effective and efficient management and maintenance of Beaufort County School District (District) buildings, grounds, and property.

The District will design and implement a program for the continuous management and maintenance of all of the District's buildings, grounds, and property. The program will be developed according to best practices, and it shall be in compliance with all State and Federal safety regulations.

The District's Chief Operational Services Officer (COSO) is responsible for the overall management and oversight of the District's buildings, grounds, and property. In strict accordance with the District's Procurement Code, the District may choose to contract for the management and maintenance of the District's buildings, grounds, and property with eligible vendors.

Within each individual school, the principal is responsible for overall management and oversight of the care and upkeep of the building, grounds, and property. The buildings, grounds, and property management provided by the District through the COSO and/or the District's contracted vendor(s) will be in support of the principal's responsibilities.

Adopted:
Revised:

Penalties for Improper Use:

Any employee who violates the terms of the administrative rule or this regulation or otherwise misuses a video camera will be subject to disciplinary action, up to and including discharge. Students who violate the terms of the administrative rule or this regulation or otherwise misuse a video camera will be subject to disciplinary action in accordance with the District's student behavior code.

Violations of the laws of the United States or the State of South Carolina may subject a person to criminal prosecution.

The District will recover the cost to repair damaged equipment from either the student's parent/legal guardian or the employee, whichever is applicable.

Notice Requirements:

Students, parents/legal guardians, and employees must be notified annually that students, employees and visitors are subject to being videotaped in public spaces, including hallways, meeting rooms, parking lots and on buses at any time. Additionally, notices must be conspicuously posted on school property at all regular entrances and all other access points on school grounds. These notices should advise individuals that they are subject to being videotaped in any public spaces, including hallways, meeting rooms, parking lots and on buses at any time.

Discipline Proceedings:

The District may use videotapes as evidence in student disciplinary proceedings. The parents/legal guardians will be notified that the District intends to introduce a videotape in advance of a disciplinary proceeding and the District will provide parents/legal guardians an opportunity to view the videotape prior to the proceeding.

Utilization:

Videotapes may be used for legitimate training purposes inside the District.

Original videotapes required as evidence in criminal, family or other court actions will be maintained by the District's Protective Services Coordinator. Videotapes used as evidence in a criminal or family court proceeding will be maintained by the Protective Services Coordinator for a period of two years.

In the event of an incident resulting in injuries or fatalities, the videotape will be secured as soon as is practicable, sealed in an envelope and submitted to the Protective Services Coordinator. The Protective Services Coordinator, in consultation with the superintendent or his/her designee and/or legal counsel, will determine disposition of the videotape.

Videotapes that show potential evidence of criminal activity will be evaluated by the Protective Services Coordinator and/or the school resource officer for evidentiary value and referral to the appropriate law enforcement agency.

Adopted:

Revised:

C-29 ENERGY CONSERVATION

Purpose: To establish the superintendent's expectations for conservation of energy in Beaufort County School District (District) facilities.

All new District facilities and equipment will meet industry and government energy conservation standards; and they will, whenever possible within budgetary constraints and limitations, exceed such standards.

In addition, led by the Chief Operational Services Officer or his/her designee,, the District will implement an energy management plan with the goals of reducing energy consumption and eliminating wasteful practices in the District's use of energy. The Chief Operational Services Officer or designee will regularly ensure that school principals and District administrators are familiar with and implementing the energy management plan.

The Chief Operational Services Officer or designee will periodically and regularly review the District's energy use practices, update the energy management plan, and institute energy saving measures wherever practical.

Adopted:

Revised:

C-30 CRISIS PLANS

Purpose: To establish the superintendent's expectations for providing reasonable protection and care to the students, staff, visitors, and facilities of the Beaufort County School District (District) during periods of unusual emergency with the intent of preventing or minimizing injury and/or damage.

The District's Protective Services Coordinator is responsible for providing training and instruction to District staff and students to prepare them to effectively deal with emergencies. On behalf of the District, the Protective Services Coordinator will coordinate his/her efforts with all local governments and law enforcement agencies.

The Protective Services Coordinator will:

- Coordinate the preparation of the preparation of crisis plans suitable to the emergency needs of all District facilities;
- Coordinate the training and instruction of staff and students to insure familiarity with and effective implementation of the emergency plans;
- Arrange for the incorporation of appropriate civil defense preparedness concepts an approved resource units into the District's instructional program; and
- Cooperate and coordinate with the appropriate state and local government officials and law enforcement in the development and implementation of the emergency plans and make the current plans and lists of responsible District personnel available to the governments and law enforcement.

Adopted:

Revised:

C-31 SAFETY/EMERGENCY DRILLS

Purpose: To establish the superintendent's expectations for the practice of safety and emergency drills in Beaufort County School District (District) facilities.

The District's Protective Services Coordinator will ensure that all schools institute and maintain a current safety/emergency plan to provide for the safety and wellbeing of students, staff, and visitors in the event of any emergency or disaster, natural or man-made.

Safety/emergency drills will be held and reported in accordance with District safety/emergency procedures and state law. The District's Protective Services Coordinator is responsible for monitoring and maintaining the District's compliance with the District's procedures and state statutes.

The District's Protective Services Coordinator shall ensure that copies of §59-63-910 through §56-93-930 of the South Carolina Code are printed and displayed in suitable form in at least one conspicuous in each school building in the District.

Adopted:
Revised:

Legal References:

S.C. Code, 1976, Amended:

§59-63-910 through §59-63-930: Fire drills.

State Board of Education Regulations:

R-43-181: Fire prevention.
R-43-182: Emergency drills.

C-32 EMERGENCY SCHOOL CLOSINGS, DELAYED OPENINGS, and EARLY DISMISSALS

Purpose: To establish the superintendent's authority for emergency school closings, delayed openings, and early dismissals of Beaufort County School District (District) facilities.

The superintendent or her/his designee has sole and specific authority to close, delay opening, or dismiss schools and District facilities on a District-wide, area-wide, or individual school basis in the event of hazardous weather or emergency.

The superintendent's or her/his designee's decision to close, delay opening, or dismiss will be informed through consultation with appropriate persons such as school administrators and safety, transportation, and weather authorities. The official announcement will be communicated expeditiously to radio and television stations and other appropriate news outlets by designated District administrators. The announcement will also be posted on the District's website.

District staff is to follow the instructions in the official media announcement or their supervisor's instructions, which take precedence over the media announcement.

Emergency closing days are considered regular work days for staff whose services are considered essential when school is not in session. When directed by District or school administration, essential staff shall report to work as soon as s/he is able.

When schools are closed or opening is delayed due to inclement weather, all other school activities are also cancelled or delayed.

Missed instructional days shall be made up except in extraordinary circumstances as authorized by law.

Adopted:

Revised:

C-33 DATA/RECORDS RETENTION

Purpose: To establish the superintendent's expectations for the retention of the data and records of the Beaufort County School District (District).

The District will establish and maintain a system for the securing, cataloging, and storing of all records that is in compliance with state and federal law. Such system will include the suspension of routine record destruction practices, as applicable.

The superintendent or **his/her designee** will establish administrative rules in compliance with the South Carolina Public Records Act, South Carolina Freedom of Information Act, and the electronic records management guidelines established and recommended by the South Carolina Department of Archives and History.

The District's "Records Management Manual", incorporated in District regulation C-33R, describes the District's procedures for the retention of District data and records. **Any additional and appropriate forms and guidelines that support this policy are published as separate documents.** Copies of the District regulation, forms, and guidelines will be available at each school and the District Office.

In the event that any state and/or federal program rules, regulations, and policies [e.g. Title I, Schools and Libraries (E-rate), etc.] are in conflict with the District's "Records Management Manual", the state and/or program rules, regulations, and policies shall supersede and take precedence over all Board of Education and District rules, regulations, and policies.

Adopted:

Revised:

Legal references:

S.C. Code, 1976, as amended:

- | | |
|-------------------------------|---|
| § 30-4-10, <u>et seq.</u> : | South Carolina Freedom of Information Act. |
| § 30-1-10 through § 30-1-140: | Public Records Act. |
| § 26-6-10 through § 26-6-210: | South Carolina Uniform Electronic Transactions Act. |

Department of Archives and History Regulations:

- | | |
|--|---|
| Regulations 12-901 through 12-906.6 – Article 9: | General retention schedules for school districts. |
|--|---|

Electronic Records Management Guidelines:

- E-mail Management (South Carolina Department of Archives and History).

C-33R RECORDS MANAGEMENT

Beaufort County School District Records Management Manual: Procedures for Meeting Record Retention Requirements – Record Storage Workflow – Record Destruction Workflow

Insert “Records Management Manual” here.

Adopted: January, 2009
Revised:

DRAFT

C-34 FACILITIES

Purpose: To establish the superintendent's expectations for the construction, operation, and maintenance of the physical infrastructure necessary to provide and support the educational program in the Beaufort County School District (District).

The superintendent delegates primary responsibility for the District's facilities construction, operation, and maintenance programs to the District's Chief Operational Services Officer (COSO). The COSO assigns day-to-day management responsibility for the facilities planning and construction program to the District's Facilities Planning and Construction Officer. The COSO assigns day-to-day management responsibility for facilities operation and maintenance to the District's **Director of Operations**.

The superintendent, in consultation with the Board of Education (Board) and District Administration and staff, and in accordance with the District's Procurement Code, may enlist the services of outside entities to assist the District with facilities planning and maintenance.

Facilities Planning, Development, and Construction:

In order to provide for the facilities capacities necessary for the delivery of the District's educational program in a clean, healthy, and safe environment, the **District's Facilities Planning and Construction Officer** will:

- Review and project annually for student enrollments and adjust attendance zones to efficiently and wisely use the District's facilities;
- Establish and regularly update a plan for the renovation of existing District facilities and, when required by student enrollment projections, facilities life-cycle determinations, etc., plan for construction of new facilities;
- Report on the District's facilities requirements regularly to the COSO, the superintendent, and the Board;
- Plan for, assist in the development of, and manage all of the District's construction-related contracts and contractors;
- Develop and maintain community involvement in the District's facilities renovation and construction plans through an independent standing Capital Improvement Committee that will monitor and periodically report on the District's construction plans and projects and the District's expenditure of taxpayer funds for those projects.

Facilities Operations and Maintenance:

In order to operate and maintain District facilities in a manner that efficiently provides a clean, healthy, and safe environment for all District students and staff, the District's **Director of Operations** will:

- Using best management practices, develop, maintain, and regularly update a preventive maintenance program to enable District facilities and equipment to reach their intended and usual life expectancies;
- In consultation with appropriate, qualified professional persons, regularly inspect for and address health-safety issues (air quality, mold, etc.) in all District facilities;
- In collaboration with the District's Facilities Planning and Construction Officer, assist in planning for the District's facilities operations and maintenance needs;

- Plan for, assist in the development of, and manage all of the District's operations/maintenance-related contracts and contractors;
- Report on the District's operations and maintenance requirements regularly to the COSO, the superintendent, and the Board;

Adopted:

Revised:

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C-28R SECURITY and VIDEO SURVEILLANCE

In order to ensure a safe and secure environment for students, staff and visitors, the Beaufort County School District (District) uses video surveillance to monitor District buildings, grounds, and property.

Video Surveillance Equipment:

Video surveillance equipment may be installed to monitor public spaces including, but not limited to, meeting rooms, hallways and parking lots.

Cameras may also be installed aboard buses.

Cameras will not be installed in individual offices or classrooms without the specific authorization of the principal or his/her designee or the superintendent or his/her designee.

Custody of Videotapes:

The superintendent or her/his designee(s) will have custody of and maintain videotapes recorded in public spaces. The District's Protective Services Coordinator will have responsibility for the custody and maintenance of videotapes recorded on buses. All videotapes must be maintained in a secure location to which students do not have access.

Access to Videotapes:

Videotapes recorded on District property and buses are the exclusive property of the District.

The District will release or permit viewing of videotapes only in certain defined situations, consistent with state and federal law, including the Family Education Rights and Privacy Act.

Videotapes will not be loaned, sold, rented, leased or otherwise made available outside the District without written permission from the superintendent or his/her designee. A media request for a videotape should be routed through the **coordinator of public information**.

A parent/legal guardian may request to review a videotape of an alleged incident involving his/her child. The principal or his/her designee will determine whether it is appropriate for a parent/legal guardian to view a tape in consultation with the superintendent or the District's safety Officer and/or legal counsel. If permitted, the principal or his/her designee will be present when the parent/legal guardian reviews the tape. The parent/legal guardian may view only that portion of the tape that pertains to his/her child.

Parents/Legal guardians, the media and others may not duplicate or make any type of recording of any video except with the written permission of the superintendent or his/her designee.

Videotapes may generally be recycled or reused after a period of five school days.

Normally, all videotapes will be erased on the last day of each school year. However, if an incident is reported or a request is made to view or copy a videotape, a videotape will be maintained as long as needed, including time for any appeals resulting from disciplinary or other actions.

Reporting Violations:

Any person who has reason to believe that a video camera is being used in violation of the policy or this administrative rule or in an otherwise improper manner should immediately notify the District's Protective Services Coordinator. The Protective Services Coordinator will investigate the allegations and take appropriate remedial or disciplinary actions as necessary.

C-10 Bonded Employees and Officers

Purpose: To establish the basic structure for bonding of employees who handle certain funds.

The superintendent will obtain an adequate bond for district and school personnel handling school and public funds, equipment and supplies. The bond will be sufficient to cover any loss incurred by the district

Adopted July 12,2001

Beaufort County Schools

C – FINANCE & OPERATIONS

C-1 Fiscal Management Goals/Priority Objectives

Purpose: To establish the superintendent's expectations for the sound fiscal management of the district.

The quantity and quality of learning programs are directly dependent on the funding provided and the effective, efficient management of those funds. Therefore, achievement of the district's purposes can best be made through excellent fiscal management.

The superintendent will be vigilant in fulfilling his/her responsibility to see the funds available are used wisely.

Because of resource limitations, there is sometimes a temptation to operate so that fiscal concerns overshadow the educational program. Recognizing this, it is essential that the district take specific action to make sure education remains central. Fiscal matters are ancillary and contribute to the educational program. The district will incorporate this concept into all aspects of district management and operation.

To achieve this vision for the management of fiscal resources, the superintendent and his/her staff will do the following:

- Regularly review the progress of academic and support programs to ensure that monies allocated are reasonable and that programmatic goals are met.

- Engage in thorough advance planning in order to develop budget recommendations and to guide expenditures in ways that achieve the greatest educational returns as well as the greatest contributions to the educational program.

- Seek levels of funding which will provide high quality education for the students of the district.

- Use the best available techniques and processes for budget development and management.

- Provide timely and appropriate information to the board and all staff with fiscal management responsibilities.

- Establish and implement efficient procedures for accounting, reporting, investing, purchasing and delivery, payroll, payment of vendors and contractors and all other areas of fiscal management.

Adopted July 12, 2001

Beaufort County Schools

C-2 Annual Budget

Purpose: To establish the superintendent's expectations for the annual operating budget.

The annual budget is the financial plan for the operation of the school system. The district will express those plans through two types of budgets.

Operating budget - a budget for the provision of annual resources.

Capital budget - a budget for the provision of necessary sites, buildings and equipment.

The budgets provide the framework for both expenditures and revenues for the year. They translate into financial terms the educational programs and priorities for the system.

Planning the budget document is a continuous process. Planning involves long-term thought, study, and deliberation by the superintendent, board, administrative staff, faculty and citizens of the district.

The superintendent will have overall responsibility for budget preparation. The superintendent will recommend an annual operating budget for Board approval..

Adopted July 12, 2001

Beaufort County Schools

C-3 Determination of Budget Priorities

Purpose: To establish the superintendent's procedures for setting budget priorities and the basic structure to carry out those procedures.

The superintendent will recommend budget priorities to the board for each fiscal year (July 1 - June 30). These priorities will be based upon the needs identified during the budget planning process as determined by the following:

- the needs of the district so that all segments of the district programs are treated equitably within the available resources,
- state and/or federal legal requirements for funding of programs,
- requirements and regulations of the regional accrediting agency,
- availability of fiscal and other non-economic resources,
- academic achievement goals as specified by the board.

Adopted July 12, 2001

Beaufort County Schools

C-4 Budget Adoption Process

Purpose: To establish the basic structure for the adoption of the annual budget.

The superintendent has the overall responsibility for budget planning.

Principals shall develop and submit budgets for their schools after seeking input from the school staff, the School Improvement Council, and a representative from the parent-teacher organization. The budgets submitted by the principals shall reflect the principal's judgment as to the most effective way to use resources to achieve the educational objectives of the school.

The superintendent will recommend an annual operating budget to the board. The board will give careful consideration to the budget request as presented by the superintendent and will review the allocations for fairness and consistency with the educational priorities of the school system.

On the date specified by the Beaufort County Council, the superintendent and the board of education will present, in a manner mutually agreed upon by the county council and the board of education, the general operating budget for the operation of schools in the county for the ensuing fiscal year.

In case the budget does not receive approval by June 30, the superintendent will recommend that board adopt a continuing resolution based on last year's operating budget until the budget can be approved.

Adopted July 12, 2001

Legal references:

S.C. Code of Laws, 1976, as amended:

Section 6-1-80 - Budget adoption

Acts and Joint Resolutions:

1968 Act 994, p 2384 - Budget prepared by county board of education, approved by County council; increase in millage approved by county legislative delegation.

Beaufort County Schools

C-5 Budget Transfers

Purpose: To establish the basic structure for budget transfers.

Periodically, the assistant superintendent for fiscal affairs will examine budget categories and estimate the year-end status of each. Based on these estimates, the superintendent authorizes his/her designee to make budget transfers within the major categories. The superintendent grants principals the discretion to make budget transfers at the individual school level; however, the assistant superintendent for fiscal affairs must approve any transfers in excess of \$5000.

Adopted July 12, 2001

Beaufort County Schools

C-6 Taxing and Borrowing

Purpose: To establish the basic structure for the superintendent's responsibility to recommend taxing and borrowing funds for the maintenance and operation of the school district.

Annual tax levy

Each school district's taxing authority is established by state law. In Beaufort County, that authority is vested in county council and legislative delegation within statutory limitations.

Borrowing

The board is permitted, by law, to borrow money in anticipation of collection of taxes. The purpose of such borrowing is to secure funds for district operations. The board must approve the issuance of tax anticipation notes. It is the responsibility of the superintendent to recommend such action to the board.

Sale of bonds

In order to obtain funds for capital improvements, the board may, from time to time, issue bonds. The limit of district bonded indebtedness is subject to the provisions of Article X of the South Carolina Constitution. It is the superintendent's responsibility to recommend the issuance of such bonds.

In order for the district to sell bonds in excess of the limitation, the community must vote for a referendum allowing such sale. The superintendent is responsible for recommending such elections.

Adopted July 12, 2001

Legal references:

S.C. Constitution

Article X, Section 15(6) - Provides for maximum debt limit of eight percent.

Article X, Section 15(7) - Provides for borrowing in anticipation of collection of ad valorem taxes .

..

S.C. Code, 1976, as amended:

Sections 11-27-10 through 11-27-100 - Effect of Article X of SC Constitution (see above) on statutes prior to its ratification. See especially Section 11-27-50 regarding the effect of Article X on school district bonds.

Sections 59-71-10 through 59-71-190 - (The School Bond Act) - Statutes regulating the issuance of general obligation bonds by school districts. In effect prior to the ratification of Article X of S. C. Constitution.

Acts and Joint Resolutions:

1968 Act 994, p. 2384 - Budget prepared by county board of education, approved by county council; increase in millage approved by county legislative delegation.

Beaufort County Schools

C-7 Funding Proposals, Grants and Special Projects

Purpose: To establish the basic structure for the seeking of additional sources of revenue for the district

In order to offer the best educational opportunities possible for students of the district, the superintendent will seek as many sources of revenue as possible to supplement the funds provided through local taxation and the basic aid offered by the state and will notify the board of all funding proposals that are accepted.

Grants from private sources

The district will seek grants of money, securities, property, etc. from private sources for scholarships, staff development and other educational improvement purposes.

Such gifts in excess of \$1,000 will be submitted to the board for approval, will be administered by the superintendent, and will be used in keeping with the terms of the gift or bequest.

The superintendent will not recommend the acceptance of bequests, endowments or other gifts if the conditions of the gift remove any portion of the public schools from control of the board.

Adopted July 12, 2001

Legal references:

S.C. Code 1976, as amended:

Section 59-19-170 - Acceptance and holding of property by trustees.

Section 59-19-180 - Purchase of land by trustees.

Section 59-69-30 - Investment of such fund.

S.C. Attorney General's Opinion:

1968-69-Opinion No. 2655, p. 71

Beaufort County Schools

C-8 Tuition Income

Purpose: To establish the basic structure for collection of tuition from nonresident students.

The superintendent may, on behalf of the board, collect tuition from nonresident students enrolled in the district's schools. The superintendent may set or reconfirm the fee on an annual basis. The fee is based on the per pupil cost of district funds (see also A-15 Nonresident Students).

The district may collect tuition in advance of enrollment. The district shall deposit such funds into the general fund.

Adopted July 12, 2001

Legal references:

S.C. Code, 1976, as amended:

Section 59-19-90(10) - Power of board to transfer and assign students.

Section 59-63-30 - Qualifications for attendance.

Section 59-63-45 - Procedures for reimbursement for districts for cost of educating non-resident students.

Section 59-63-480& 490 - Attendance at schools in adjacent county.

Beaufort County Schools

C-9 Authorized Signatures

Purpose: To establish the basic structure for the signing of checks drawn on district and school accounts.

The district superintendent is authorized by the board to sign payroll and accounts payable checks.

The principal is authorized to sign checks on his/her school accounts. In case of emergency, an assistant principal is authorized to sign checks with prior approval from the assistant superintendent for fiscal affairs.

Adopted July 12, 2001

Beaufort County Schools

C-10 Bonded Employees and Officers

Purpose: To establish the basic structure for bonding of employees who handle certain funds.

The superintendent will obtain an adequate bond for district and school personnel handling school and public funds, equipment and supplies. The bond will be sufficient to cover any loss incurred by the district.

Adopted July 12, 2001

Beaufort County Schools

C-11 Fiscal Accounting and Reporting

Purpose: To establish the superintendent's expectations for accounting for and reporting of the district's financial resources.

The district accounting system will provide an accurate record of financial transactions. The assistant superintendent for fiscal affairs will maintain accounting procedures adequate to properly record all financial transactions in accordance with the Financial Accounting Handbook developed by the South Carolina State Department of Education.

The superintendent is ultimately responsible for receiving and properly accounting for all funds of the district.

The superintendent or assistant superintendent for fiscal affairs will present the board with quarterly financial statements which reflect the financial condition of the district.

Adopted July 12, 2001

Legal references:

S.C. Code 1976, Amended:

Section 59-13-60 - Spending priority; audits; reports; Education Finance Review Committee.

Section 59-20-80 - School budgets will be made public; itemization of salaries.

Beaufort County Schools

C-12 Inventories

Purpose: To establish a basic structure for the accurate inventory of district property.

The superintendent is responsible for setting up a system to maintain an accurate inventory of materials, equipment and real estate in the school system.

Each year prior to the closing of school, the principal of each school will arrange for an inventory of textbooks and vocational education equipment. The inventory will include the serial numbers of all equipment. Additionally each school will receive annually from the district a fixed asset inventory list to be reviewed and updated. The principal will forward the corrected inventory list to the district's property accounting agent for district accounting purposes.

The principal will keep the inventory on file in his/her office. The principal will forward a copy of the furniture and equipment inventory to the district's property accounting agent for district accounting purposes.

Adopted July 12, 2001

Legal references:

State Board of Education Regulations:

R-43-174 - Accounting and reporting inventories.

Beaufort County Schools

C-13 Audits/Financial Monitoring

Purpose: To establish the basic structure for auditing and monitoring the district's financial activities.

In accordance with state law and regulation, all district financial records will be audited following the close of each fiscal year.

The board will employ a certified public accountant as recommended by the Audit Committee to conduct the annual audit. The audit will be presented first to the Audit Committee and then to the board and to the public at a regularly scheduled board meeting. The board will make copies available to the public and the media.

The district will forward a copy of appropriate audits to the State Department and to the local libraries as required by applicable state law or regulations. The school funds in the district will also be audited annually.

Adopted July 12, 2001

Legal references:

S.C. Code, 1976, as amended.

Section 59-20-60 - Audit Requirements of the Education Finance Act.

State Board of Education Regulations:

R-43-175 - Audits

Beaufort County Schools

C-14 Purchasing

Purpose: To establish the basic structure for the expenditure of district funds.

It is the expectation of the superintendent that all matters involving purchasing will be conducted in accordance with the district's procurement code adopted July 1999. A copy of this code can be found in the district administrative offices.

The assistant superintendent for fiscal affairs will be responsible for the compliance with the procurement code.

Adopted July 12, 2001

Beaufort County Schools

C-15 Sales Calls To Staff

Purpose: To establish the superintendent's expectations for sales calls on district staff.

Sales representatives are not permitted to call on teachers or other school staff members at district sites without authorization from the superintendent or his/her designee..

The superintendent or his/her designee may give permission to sales representatives of educational products to see members of the school staffs at times that will not interfere with the educational program.

Adopted July 12, 2001

Beaufort County Schools

C-16 Payment Procedures

Purpose: To establish the superintendent's expectations for payment of district obligations.

The Superintendent will receive, hold in custody and expend all funds as directed by the school board.

The district will make all payment for goods and services only under these conditions:

- against invoices, properly supported by authorized purchase orders;
- against properly submitted vouchers covering authorized expenses;
- in accordance with salary schedules or salaries set by the board.

Adopted July 12, 2001

Legal references:

S.C. Code, 1976, as amended:

Section 11-1-40 - Unlawful to contract in excess of appropriate amount and to divert current funds for payment of prior obligations.

Section 59-10-80 - All employment and purchase contracts require board approval.

Section 59-19-290 - All contracts in excess of apportioned funds are void.

Beaufort County Schools

C-17 Salary Deductions

Purpose: To establish the basic structure for deductions from employees' salaries.

All deductions from salary, except for deductions required by law, are subject to approval by the superintendent and are voluntary on the part of the individual employee. The district requires that voluntary deductions be authorized in writing by the employee on a form supplied by the district.

The follow payroll deductions are required by law:

Social Security;

State and Federal income tax;

State Retirement.

The following additional payroll deductions are allowed by law and are approved by the superintendent.

- extended family benefits for health insurance;
- tax sheltered annuity plans which meet board established criteria;
- employee credit unions;
- deductions for state-authorized group survivor monthly income insurance programs and term life insurance.

The superintendent will consider deductions for charitable organizations only after each organization submits evidence that it has a current 501(c)(3) classification with the Internal Revenue Service.

The district will not make deductions for any organization which is chartered by Section 501(c)(4)(5) or (6) of Title 26 U.S. Code.

The district will not make deductions for any organization whose parent or subsidiary organization fails to met the requirements herein.

The district will not make any deductions if the proceeds of the deduction would be for the benefit of a labor organization.

Adopted July 12, 2001

Legal references:

S.C. Code, 1976, as amended:

Section 8-11-91 - Deductions for charitable contributions.

Section 8-11-92 - Qualifying criteria for charitable organizations.

Section 8-11-93 - Minimum level of employee participation required (Lesser of 10% or 200 employees).

Section 8-11-98 - Deductions for payment to credit union.

Beaufort County Schools

C-18 Expense Authorization/Reimbursement

Purpose: To establish the basic structure for authorizing and reimbursing expenses for district employees.

The district will reimburse board members and employees for expenses incurred in approved travel for the district, such as approved attendance at conferences and other authorized expenses necessary in performing their duties. The appropriate administrator must approve employee travel. The mileage reimbursement rate will be consistent with the Internal Revenue Service standard.

All expense reports must be filled out and submitted and expenses will be reimbursed according to the Finance Procedure Manual.

Adopted July 12, 2001

Beaufort County Schools

C-19 Cash in School Buildings

Purpose: To establish the superintendent's expectations for dealing with cash in school buildings.

Money will not be kept overnight in a school under any circumstances.

The superintendent requires that all principals make deposits of school monies on a daily basis at the end of each school day or after a school event. The principal may make arrangements with local banks for night depository privileges and use these facilities when necessary.

Principals who do not abide by this policy will be responsible for any loss incurred as a result of their failure to make a timely deposit and may be subject to further disciplinary action.

Adopted July 12, 2001

Beaufort County Schools

OS-1 FISCAL MANAGEMENT GOALS, RESPONSIBILITIES AND PRIORITY OBJECTIVES

Purpose: To establish the superintendent's expectations for the sound fiscal management of the Beaufort County School District.

The quantity and quality of learning programs are directly dependent on the funding provided and the effective, efficient management of those funds. Therefore, achievement of the district's goals can best be made through excellent fiscal management.

The finance department is assigned responsibility for the district's fiscal management. It is the finance department's function to do the following.

- Develop an operating budget that meets the priorities of the superintendent, using the best available techniques and processes for budget development and management to achieve the board of education's goals.
- Monitor the spending of district funds in accordance with the approved budget, the Beaufort County School District procurement code, grant guidelines and federal and state guidelines.
- Provide timely and appropriate information to the board of education and all staff with fiscal management responsibilities.
- Develop, operate and maintain accounting systems to control spending, safeguard district assets, and comply with federal and state requirements.
- Comply with and provide reporting to federal and state government agencies including, but not limited to, the IRS, Social Security Administration, SC Department of Revenue and the SC Employment Security Commission.
- Reconcile the district's cash balances held by the Beaufort County Treasurer.
- Ensure compliance with generally accepted accounting principles.
- Produce the annual audited Comprehensive Annual Financial Report (CAFR).
- Monitor the district's fund balance.
- Monitor investments held.
- Issue general obligation bonds and monitor bond payments.
- Establish and implement efficient procedures for accounting, reporting, investing, purchasing, receiving, payroll, payment of vendors and contractors and all other areas of fiscal management.
- Establish and maintain effective internal controls.

Adopted 7/12/01; Revised 10/2014

OS-2 ANNUAL BUDGET

Purpose: To establish the superintendent's expectations for the annual budgets of the Beaufort County School District.

The financial plan for the operation of the district is comprised of the annual budgets. The district will express those plans through three types of budgets.

- **Operating budget** - a budget for the provision of annual resources.
- **Debt service budget** - a budget for the provision of annual resources for the retirement of principal and interest payments.
- **Capital budget** - a budget for the provision of necessary sites, buildings and equipment.

The budgets provide the framework for both expenditures and revenues for the year. They translate into financial terms the educational programs and priorities for the system.

The superintendent will have overall responsibility for budget preparation. The superintendent will recommend annual operating debt service and capital budgets for board of education approval.

Planning the budget document is a continuous process. Planning involves long-term thought, study and deliberation by the superintendent, the board, administrative staff, faculty and citizens of the district.

The development of the operating budget begins late in each calendar year with the determination of budget priorities. The budget process proceeds through adoption by the board, usually in May, and subsequent approval of the millage rate by the Beaufort County Council near June 30th of each year.

The operating budget is developed using the following.

- projected student enrollments
- non-salaried school budgets using both the district developed per pupil cost formula and a modified zero base (MZB) format
- special services program funding
- staffing formulas
- department budgets using a modified zero base (MZB)

The debt service budget will be developed with the assistance of the district's contracted financial advisor. The budget will reflect the most economical and effective method of retiring outstanding debt.

The development of the capital budget (eight percent projects budget) occurs annually between January and April and is a collaborative effort between the schools and district-level departments. It is the responsibility of the district's facilities planning and construction (FPC) staff to work with the schools, district maintenance staff and district office staff to gather input to identify school and district needs and establish priorities during the planning phase. The FPC uses the collected input to develop data and to evaluate and prioritize the needs for the eight percent capital projects under consideration.

When project needs are prioritized, the FPC develops cost estimates for the projects and presents its proposed eight percent capital projects plan (plan) to the district's chief operational services

OS-2 ANNUAL BUDGET

Purpose: To establish the superintendent's expectations for the annual budgets of the Beaufort County School District.

The financial plan for the operation of the district is comprised of the annual budgets. The district will express those plans through three types of budgets.

- **Operating budget** - a budget for the provision of annual resources.
- **Debt service budget** - a budget for the provision of annual resources for the retirement of principal and interest payments.
- **Capital budget** - a budget for the provision of necessary sites, buildings and equipment.

The budgets provide the framework for both expenditures and revenues for the year. They translate into financial terms the educational programs and priorities for the system.

The superintendent will have overall responsibility for budget preparation. The superintendent will recommend annual operating debt service and capital budgets for board of education approval.

Planning the budget document is a continuous process. Planning involves long-term thought, study and deliberation by the superintendent, the board, administrative staff, faculty and citizens of the district.

The development of the operating budget begins late in each calendar year with the determination of budget priorities. The budget process proceeds through adoption by the board, usually in May, and subsequent approval of the millage rate by the Beaufort County Council near June 30th of each year.

The operating budget is developed using the following.

- projected student enrollments
- non-salaried school budgets using both the district developed per pupil cost formula and a modified zero base (MZB) format
- special services program funding
- staffing formulas
- department budgets using a modified zero base (MZB)

The debt service budget will be developed with the assistance of the district's contracted financial advisor. The budget will reflect the most economical and effective method of retiring outstanding debt.

The development of the capital budget (eight percent projects budget) occurs annually between January and April and is a collaborative effort between the schools and district-level departments. It is the responsibility of the district's facilities planning and construction (FPC) staff to work with the schools, district maintenance staff and district office staff to gather input to identify school and district needs and establish priorities during the planning phase. The FPC uses the collected input to develop data and to evaluate and prioritize the needs for the eight percent capital projects under consideration.

When project needs are prioritized, the FPC develops cost estimates for the projects and presents its proposed eight percent capital projects plan (plan) to the district's chief operational services

ANNUAL BUDGET

Admin. Reg. OS-2
June, 2015

- I. **Purpose.** To establish the Superintendent's expectations for the annual budgets of the Beaufort County School District ("BCSD").
- II. **Annual Budgets.** The financial plan for the operation of the BCSD is comprised of the annual budgets.
 - A. The BCSD will express those plans through three (3) types of budgets:
 1. Operating budget - a budget for the provision of annual resources.
 2. Debt service budget - a budget for the provision of annual resources for the retirement of principal and interest payments.
 3. Capital budget - a budget for the provision of necessary sites, buildings and equipment.
 - B. The budgets provide the framework for both expenditures and revenues for the year. They translate the BCSD educational programs and priorities into financial terms.
 - C. The Superintendent will have overall responsibility for budget preparation. The Superintendent will recommend annual operating, debt service and capital budgets for approval by the Board.
 - D. Planning the budget document is a continuous process. Planning involves long-term thought, study and deliberation by the Superintendent, the Board, administrative staff, faculty and citizens residing within the boundaries served by the BCSD.
 - E. The development of the operating budget begins late in each calendar year with the determination of budget priorities. The budget process proceeds through adoption by the Board, usually in May, and subsequent approval of the millage rate by the Beaufort County Council on or about June 30th of each year.
 - F. The operating budget is developed using the following:
 1. projected student enrollments;
 2. non-salaried school budgets using both the BCSD developed per pupil cost formula and a modified zero base (MZB) format;
 3. special services program funding;
 4. staffing formulas; and
 5. department budgets using a modified zero base (MZB).
 - G. The debt service budget will be developed with the assistance of the BCSD's contracted financial advisor. The budget will reflect the most economical and effective method of issuing and retiring outstanding debt.

Adopted: July 12, 2001
Revised: June, 2015

Legal references:

- A. S. C. Code of Laws, 1976, as amended:
 - 1. Section 6-1-80 - Budget adoption.
 - 2. Section 6-1-300, et seq.- Authority of local governments to assess taxes and fees.
- B. Acts and Joints Resolutions:
 - 1. 1968 Act 994 - Budget prepared by county board of education; approved by county council; increase in millage approved by county legislative delegation.

OS - 3 DETERMINATION OF BUDGET PRIORITIES

Purpose: To establish the superintendent's procedures for establishing the budget priorities of the Beaufort County School District and the basic structure to carry out those procedures.

Using the board's goals, the superintendent initiates the budget process by working with staff to establish the budget priorities for the new fiscal year. He/She then conveys the established priorities and resulting expectations for the annual budget to the chief operational services officer (COSO). The COSO and his/her staff then translate the budget priorities and expectations into monetary terms and begin developing the operating budget debt service and capital budgets.

With assistance from the management team, the superintendent will present and recommend budget priorities to the board of education for each fiscal year (July 1 - June 30). These priorities will be based upon the needs identified during the budget planning process as determined by the following.

- academic achievement goals as specified by the board of education
- educational program needs of the district
- state and/or federal legal requirements for funding of programs
- requirements and regulations of the regional accrediting agency
- availability of fiscal and other non-economic resources
- fund balance requirement as determined by the board of education

Adopted 7/12/01; Revised 10/2014

DETERMINATION OF BUDGET PRIORITIES

Admin. Reg. OS-3
June, 2015

I. **Purpose.** To establish the Superintendent's procedures for establishing BCSD budget priorities and the basic process and structure to carry out those procedures.

II. **Process.**

A. Using the Board's goals, the Superintendent shall initiate the annual BCSD budget process by working with staff to establish budget priorities for the upcoming fiscal year. The Superintendent shall then convey the established priorities and resulting expectations for the annual budget to the Chief Operational Services Officer (COSO). The COSO and his/her staff shall then translate the budget priorities and expectations into monetary terms and begin developing the operating budget, debt service and capital budgets.

B. With assistance from the BCSD management team, the Superintendent shall present and recommend budget priorities to the Board for the upcoming fiscal year (July 1 - June 30). These priorities will be based upon the needs identified during the budget planning process as determined by the following:

1. academic achievement goals as specified by the Board;
2. BCSD educational program needs;
3. state and/or federal legal requirements for funding of programs;
4. requirements and regulations of the regional accrediting agency;
5. availability of fiscal and other non-economic resources; and
6. the BCSD fund balance requirement as determined by the Board.

Adopted: July 12, 2001
Revised: June, 2015

OS - 4 BUDGET ADOPTION PROCESS

Purpose: To establish the basic structure for the adoption of the annual budget of the Beaufort County School District.

The superintendent has the overall responsibility for the district's budget planning.

At the direction of the superintendent, school principals will develop and recommend budgets for their schools after seeking input from the school staff, the school improvement council and a representative from the parent-teacher organization (PTO) and/or SIC. The budgets submitted by the principals will reflect their judgment as to the most effective and efficient ways to use resources to achieve the educational objectives of the schools.

At the direction of the superintendent, department heads will develop and recommend budgets for their departments after seeking input from department staff. The budgets submitted by the department heads will reflect their judgment as to the most effective and efficient ways to use resources to support the educational objectives of the district.

The superintendent will recommend an annual operating budget to the board of education. The board will give careful consideration to the budget request as presented by the superintendent and will review the allocations for fairness and consistency with the educational priorities of the district.

On the date(s) specified by the Beaufort County Council, the superintendent and the board will present, in a manner mutually agreed upon by the council and the board, the general operating budget for the operation of schools in the county for the ensuing fiscal year.

In case the budget does not receive approval by June 30, the superintendent will recommend that the board adopt a continuing resolution based on last year's operating budget until the budget can be approved.

Notice of budget adoption

Before adopting this budget for the next fiscal year, the district will advertise the public hearing on the budget in at least one South Carolina newspaper of general circulation in the area. The notice must appear not less than 15 days in advance of the public hearing. The notice must be a minimum of two columns wide with a bold heading.

The notice must include the following.

- governing entity's name
- time, date and location of the public hearing on the budget
- total revenues and expenditures from the current operating fiscal year's budget of the governing entity
- proposed total projected revenue and operating expenditures for the next fiscal year as estimated in the next year's budget for the governing entity
- proposed or estimated percentage change in estimated operating budgets between the current fiscal year and the proposed budget
- millage for the current fiscal year
- estimated millage in dollars as necessary for the next fiscal year's proposed budget

Adopted 7/12/01; Revised 10/2014

OS - 4 BUDGET ADOPTION PROCESS

Purpose: To establish the basic structure for the adoption of the annual budget of the Beaufort County School District.

The superintendent has the overall responsibility for the district's budget planning.

At the direction of the superintendent, school principals will develop and recommend budgets for their schools after seeking input from the school staff, the school improvement council and a representative from the parent-teacher organization (PTO) and/or SIC. The budgets submitted by the principals will reflect their judgment as to the most effective and efficient ways to use resources to achieve the educational objectives of the schools.

At the direction of the superintendent, department heads will develop and recommend budgets for their departments after seeking input from department staff. The budgets submitted by the department heads will reflect their judgment as to the most effective and efficient ways to use resources to support the educational objectives of the district.

The superintendent will recommend an annual operating budget to the board of education. The board will give careful consideration to the budget request as presented by the superintendent and will review the allocations for fairness and consistency with the educational priorities of the district.

On the date(s) specified by the Beaufort County Council, the superintendent and the board will present, in a manner mutually agreed upon by the council and the board, the general operating budget for the operation of schools in the county for the ensuing fiscal year.

In case the budget does not receive approval by June 30, the superintendent will recommend that the board adopt a continuing resolution based on last year's operating budget until the budget can be approved.

Notice of budget adoption

Before adopting this budget for the next fiscal year, the district will advertise the public hearing on the budget in at least one South Carolina newspaper of general circulation in the area. The notice must appear not less than 15 days in advance of the public hearing. The notice must be a minimum of two columns wide with a bold heading.

The notice must include the following.

- governing entity's name
- time, date and location of the public hearing on the budget
- total revenues and expenditures from the current operating fiscal year's budget of the governing entity
- proposed total projected revenue and operating expenditures for the next fiscal year as estimated in the next year's budget for the governing entity
- proposed or estimated percentage change in estimated operating budgets between the current fiscal year and the proposed budget
- millage for the current fiscal year
- estimated millage in dollars as necessary for the next fiscal year's proposed budget

Adopted 7/12/01; Revised 10/2014

BUDGET ADOPTION PROCESS

Admin. Reg. OS-4
June, 2015

- I. **Purpose.** To establish the basic structure for the adoption of the BCSD annual budget.
- II. **Responsibility for Budget Planning.** The Superintendent has the overall responsibility for the BCSD budget planning.
- III. **Development of Proposed School Budgets.** At the direction of the Superintendent, school principals shall develop and recommend proposed budgets for their schools after seeking input from school staff, their school improvement council and a representative from the parent-teacher organization (PTO) and/or SIC. The budgets submitted by the principals shall reflect their judgment as to the most effective and efficient ways to use resources to achieve the educational objectives of their schools. Any and all final allocations to schools are at the discretion of the Board.
- IV. **Development of Proposed Departmental Budgets.** At the direction of the Superintendent, BCSD department heads shall develop and recommend proposed budgets for their departments after seeking input from department staff. The budgets submitted by the department heads shall reflect their judgment as to the most effective and efficient ways to use resources to support the BCSD educational objectives. Any and all final allocations to BCSD departments shall be at the discretion of the Board.
- V. **Recommendation of Annual Operating Budget.** The Superintendent shall recommend an annual operating budget to the Board. The Board shall give careful consideration to the Superintendent's budget request and review the allocations for fairness and consistency with the BCSD educational priorities.
- VI. **Presentation to County Council.** On the date(s) specified by the Beaufort County Council, the Superintendent and the Board shall present, in a manner mutually agreed upon by the County Council and the Board, the proposed general operating budget for the operation of the BCSD for the ensuing fiscal year.
- VII. **Continuing Resolution.** In the event the annual budget for the upcoming fiscal year does not receive approval by County Council by June 30, no later than June 30, the Superintendent shall recommend the Board adopt a continuing resolution based on the current fiscal year's operating budget until the new fiscal year budget can be approved.
- VIII. **Notice of Budget Adoption.**
 - A. Before adopting this budget for the next fiscal year, the BCSD through County Council shall advertise a public hearing on the proposed budget in at least one (1) South Carolina newspaper of general circulation in the area. The notice must appear not less than fifteen (15) calendar days in advance of the public hearing. The notice must be a minimum of two (2) columns wide with a bold heading.
 - B. The notice must include the following:
 1. the name of the BCSD;
 2. the time, date and location of the public hearing on the budget;

BUDGET TRANSFERS AND CARRYOVER FUNDS

Admin. Reg. OS-5
June, 2015

- I. **Purpose.** To establish the basic structure for budget transfers within the Beaufort County School District.
- II. **Budget transfers**
- A. Periodically, the Chief Operational Services Officer ("COSO") will examine budget categories and estimate the year-end status of each. Based on these estimates, the Superintendent may authorize his/her designee to make budget transfers within the major categories.
 - B. The Superintendent grants principals and department heads discretionary authority to make non-salary budget transfers for their schools or departments pursuant to the following conditions.
 - 1. Requests for changes to a school or departmental budget must be made by an electronic budget transfer;
 - 2. Budget transfers may only occur within a fund; and
 - 3. Budget transfers with line items exceeding \$5,000 must be approved by the COSO;
 - C. Only the Superintendent or the COSO is authorized to approve transfers of salary line items in the general fund.
 - D. Each school and department shall be provided a copy of approved budget transfers, and a copy will be maintained in the finance department. The distribution of the school/department copy shall serve as notification the transfer was posted to the general ledger.
 - E. Transfers outside of program functions (e.g. instructional, support, etc.) exceeding \$50,000 must be approved by the Board.
 - F. Budget transfer requests within the capital projects funds shall be requested by the project managers via email. Transfers within a school location shall be reviewed and, if appropriate and meeting BCSD guidelines, authorized by the project manager. Transfers to/from the BCSD construction contingency accounts must be authorized by the BCSD facilities planning and construction officer.
- III. **Carryover Funds.** The BCSD administrative staff shall operate the BCSD within the budget established for the particular department or school. Carryover funds in general fund accounts from one fiscal year to the next are not permitted.

Adopted: July 12, 2001
Revised: June, 2015

BUDGET TRANSFERS AND CARRYOVER FUNDS

Admin. Reg. OS-5
January, 2015

- I. **Purpose.** To establish the basic structure for budget transfers within the Beaufort County School District.
- II. **Budget transfers**
 - A. Periodically, the chief operational services officer will examine budget categories and estimate the year-end status of each. Based on these estimates, the superintendent authorizes his/her designee to make budget transfers within the major categories.
 - B. The superintendent grants principals/department heads discretionary authority to make non-salary budget transfers at the individual school/department level under the following conditions.
 - 1. Requests for changes to a school/departmental budget may be made by an electronic budget transfer.
 - 2. Budget transfers may only occur within a fund.
 - 3. Budget transfers with line items exceeding \$5,000 must be approved by the chief operational services officer (COSO).
 - 4. Only the superintendent or the COSO is authorized to approve transfers of salary line items in the general fund.
 - C. Each school/department will be given a copy of approved budget transfers and a copy will be maintained in the finance department. The distribution of the school/department copy will serve as notification that the transfer was posted to the general ledger.
 - D. Periodically, the COSO will examine budget categories and estimate the year-end status of each. Based on these estimates, the superintendent authorizes his/her designee to make budget transfers within the major categories. Transfers outside of program functions (e.g. instructional, support, etc.) exceeding \$50,000 must be approved by the board of education.
 - E. Budget transfer requests within the capital projects funds are requested by the project managers via email. Transfers within a school location are authorized by the project manager. Transfers to/from the district's construction contingency accounts must be authorized by the district's facilities planning and construction officer.
- III. **Carryover Funds.** The administrative staff will operate the school system within the budget established for the particular department or school. Carryover funds in general fund accounts are not permitted.

Adopted: July 12, 2001
Revised: October, 2014

TAXING AND BORROWING

Admin. Reg. OS-6
June, 2015

- I. **Purpose.** To establish the basic structure and responsibility for the Superintendent's recommendations for taxing and borrowing funds for the maintenance and operation of the Beaufort County School District.
- II. **Annual tax levy.** Each school district's taxing authority is established by state law. In Beaufort County, that authority is vested in the County Council and the legislative delegation within statutory limitations.
- III. **Borrowing.** The Board is permitted, by law, to borrow money in anticipation of collection of taxes. The purpose of such borrowing is to secure funds for BCSD operations. The Board then must approve the issuance of tax anticipation notes. It is the responsibility of the Superintendent to recommend such action to the Board, if necessary.
- IV. **Sale of Bonds.**
 - A. In order to obtain funds for capital improvements, the Board may, from time to time, issue bonds, subject to the provisions of Article X of the South Carolina Constitution. It is the Superintendent's responsibility to recommend the issuance of such bonds.
 - B. In order for the BCSD to sell bonds in excess of the limitation set forth in Article X of the South Carolina Constitution, the community must approve a referendum allowing such sale. The Superintendent is responsible for recommending such elections.

Adopted: July 12, 2001
Revised: June, 2015

Legal references:

- A. S. C. Constitution:
 1. Article X, Section 15(6) - Provides for maximum debt limit of eight percent.
 2. Article X, Section 15(7) - Provides for borrowing in anticipation of collection of ad valorem taxes.
- B. S. C. Code, 1976, as amended:
 1. Sections 11-27-10 through 11-27-100 - Effect of Article X of S.C. Constitution (see above) on statutes prior to its ratification. See especially Section 11-27-50 regarding the effect of Article X on school district bonds.
 2. Sections 59-71-10 through 59-71-190 - (The School Bond Act) - Statutes regulating the issuance of general obligation bonds by school districts. In effect prior to the ratification of Article X of S. C. Constitution.
 3. Section 59-13-70 - Superintendent will keep record of school district bonds.
- C. Acts and Joint Resolutions:
 1. 1968 Act 994, p. 2384 - Budget prepared by county board of education, approved by county council; increase in millage approved by county legislative delegation.

OS - 6 TAXING AND BORROWING

Purpose: To establish the basic structure and responsibility for the superintendent's recommendations for taxing and borrowing funds for the maintenance and operation of the Beaufort County School District.

Annual tax levy

Each school district's taxing authority is established by state law. In Beaufort County, that authority is vested in county council and the legislative delegation within statutory limitations.

Borrowing

The board of education is permitted, by law, to borrow money in anticipation of collection of taxes. The purpose of such borrowing is to secure funds for district operations. The board must approve the issuance of tax anticipation notes. It is the responsibility of the superintendent to recommend such action to the board.

Sale of bonds

In order to obtain funds for capital improvements, the board may, from time to time, issue bonds. The limit of district bonded indebtedness is subject to the provisions of Article X of the South Carolina Constitution. It is the superintendent's responsibility to recommend the issuance of such bonds.

In order for the district to sell bonds in excess of the limitation stated in Article X, the community must vote for a referendum allowing such sale. The superintendent is responsible for recommending such elections.

Adopted 7/12/01; Revised 10/14

Legal references:

- A. S. C. Constitution:
 - 1. Article X, Section 15(6) - Provides for maximum debt limit of eight percent.
 - 2. Article X, Section 15(7) - Provides for borrowing in anticipation of collection of ad valorem taxes.
- B. S. C. Code, 1976, as amended:
 - 1. Sections 11-27-10 through 11-27-100 - Effect of Article X of S.C. Constitution (see above) on statutes prior to its ratification. See especially Section 11-27-50 regarding the effect of Article X on school district bonds.
 - 2. Sections 59-71-10 through 59-71-190 - (The School Bond Act) - Statutes regulating the issuance of general obligation bonds by school districts. In effect prior to the ratification of Article X of S. C. Constitution.
 - 3. Section 59-13-70 - Superintendent will keep record of school district bonds.
- C. Acts and Joint Resolutions:
 - 1. 1968 Act 994, p. 2384 - Budget prepared by county board of education, approved by county council; increase in millage approved by county legislative delegation.

OS - 7 FUNDING PROPOSALS, GRANTS AND SPECIAL PROJECTS

Purpose: To establish the basic structure for the seeking of additional sources of revenue for the Beaufort County School District.

In order to offer the best educational opportunities possible for students of the district and in order to supplement the funds provided through local taxes and the basic aid provided by the state, the superintendent will seek revenue from as many alternate sources as possible. The superintendent will notify the board of education of all funding proposals that he/she intends to pursue.

Grants from private sources

The district will seek grants of money, securities, property, etc., from private sources for scholarships, staff development and other educational improvement purposes.

Such gifts of \$5,000 and above will be submitted to the board for approval, will be administered by the superintendent and will be used in a manner that complies with the terms of the gift or bequest.

The superintendent will not recommend the acceptance of bequests, endowments or other gifts if the conditions of the gift remove any portion of the public schools from control of the board.

Modification or construction of facilities through the use of private funds

The superintendent may seek or accept private funds to be used to modify and/or construct district facilities on district property under the following conditions.

The board must review and approve modification or construction project plans as presented by the district's facilities, planning and construction office prior to any fundraising effort. (*Note: "modifications" include, but are not limited to, projects such as the attachment of cabinets to the walls of district facilities.*) Such plans will include the following.

- complete and comprehensive description of the proposed project
- estimates of upfront and ongoing costs the district may or will incur if the project is completed
- consideration of any effect completion of the project may or will have on the district's compliance with the rules, regulations and policies of Title IX
- consideration of any effect completion of the project may or will have on the district's equitable provision of facilities to same or similar school facilities

Unless the board specifically agrees in advance, such projects must adhere to the following.

- be fully funded without the use of district funds
- be fully funded prior to the commencement of work
- be in full and complete compliance with the rules, regulations and policies of the South Carolina office of school facilities
- provide the district with full and complete ownership and control of the result or the modification or construction
- comply with district policies regarding the naming of facilities

Adopted 7/12/01; Revised 10/14

FUNDING PROPOSALS, GRANTS AND SPECIAL PROJECTS

**Admin. Reg. OS-7
June, 2015**

- I. Purpose.** To establish the basic structure for the seeking of additional sources of revenue for the Beaufort County School District ("BCSD").
- II. Authority and Direction of Superintendent.**
 - A. In order to offer the best educational opportunities possible for BCSD students, the Superintendent is directed and authorize to seek as many sources of revenue as possible from public and private sources to supplement the funds provided through local taxation and the basic aid offered by the State.
 - B. The Superintendent or his/her designee shall notify the Board of the intent to apply for any BCSD-wide grants in excess of One Million and No/100 Dollars (\$1,000,000.00) in value.
 - C. The Superintendent shall require all schools and District Office departments to submit all grant applications to the Director of Grant Management for review prior to submitting.
- III. Grants from Private Sources.**
 - A. The BCSD will seek grants of money, securities, real property, and personal property from private sources for scholarships, staff development and other educational improvement purposes.
 - B. Gifts of One Thousand and No/100 Dollars (\$1,000.00) and above must be approved by the Superintendent or his/her designee.
 - C. Gifts of Five Thousand and No/100 Dollars (\$5,000.00) and above shall be submitted to the Board for approval.
 - D. The BCSD shall use all gifts and bequests in accordance with their terms.
 - E. The Superintendent shall not accept or recommend the acceptance of any grants, bequests, endowments or other gifts if the conditions of the gift remove any portion of the public schools from control of the Board.
- IV. Modification or Construction of Facilities Through Use of Private Funds.**
 - A. The Superintendent may see or accept private funds to be used to modify and/or construct BCSD facilities on BCSD property under the following conditions.
 - B. The Board shall review and approve modification or construction project plans as presented by the BCSD facilities, planning and construction office prior to any

OS - 8 TUITION INCOME

Purpose: To establish the basic structure for collection of tuition from nonresident students of the Beaufort County School District.

On behalf of the board of education, the superintendent may collect tuition from nonresident students who enroll, or are enrolled, in the district's schools. The fee is an amount equal to the prior year's local revenue per child raised by the millage levied for school district operations and debt service reduced by school taxes on real property owned by the child paid to the school district in which he is enrolled as outlined in Section 59-63-45 (see also SS-8, Admission of Nonresident Students).

The superintendent may collect tuition in advance of enrollment. The superintendent will deposit such funds into the general fund.

Adopted 7/12/01; Revised 10/14

Legal references:

A. S.C. Code, 1976, as amended:

1. Section 59-19-90(10) - Power of board to transfer and assign students.
2. Section 59-63-30 - Qualifications for attendance.
3. Section 59-63-45 - Procedures for reimbursement for districts for cost of educating non-resident students.
4. Section 59-63-480 & 490 - Attendance at schools in adjacent county.

TUITION INCOME

Admin. Reg. OS-8
June, 2015

I. **Purpose.** To establish the basic structure for collection of tuition from nonresident students enrolled in the Beaufort County School District.

II. **Collection of Tuition.**

A. On behalf of the Board, the Superintendent may collect tuition from nonresident students who enroll, or are enrolled, in a BCSD school. This amount may be collected in advance of a student's enrollment.

B. The tuition to be collected shall be equal to the prior year's local revenue per child raised by the millage levied for BCSD operations and debt service reduced by school taxes on real property owned by the child paid to the BCSD, pursuant to S.C. Code Ann. § 59-63-45. See also, SS-8, Admission of Nonresident Students).

C. Collected tuition from nonresident students shall be deposited into the BCSD general fund.

Adopted: July 12, 2001

Revised: June, 2015

Legal references:

- A. S.C. Code, 1976, as amended:
1. Section 59-19-90(10) - Power of board to transfer and assign students.
 2. Section 59-63-30 - Qualifications for attendance.
 3. Section 59-63-45 - Procedures for reimbursement for districts for cost of educating non-resident students.
 4. Section 59-63-480 & 490 - Attendance at schools in adjacent county.

AUTHORIZED SIGNATURES

Admin. Reg. OS-9
June, 2015

- I. **Purpose.** To establish the basic structure for the signing of checks drawn on BCSD and school accounts and for the signing of other internal, finance-related documents.
- II. **Payroll and Accounts Payable.** The Superintendent and Chief Operational Services Officer are authorized by the Board to sign payroll and accounts payable checks for the BCSD.
- III. **Contracts.** All contracts in excess of \$2,500.00 must be signed by the Superintendent. Only chief officers may sign contracts up to \$2,500.00. No other staff, including principals, have authority to sign contracts binding the BCSD.
- IV. **School Accounts.** School principals are authorized by the Superintendent to sign checks on his/her school's accounts. In case of emergency and with prior approval by the BCSD Chief Operational Services Officer, an Assistant Principal may be authorized to sign checks on accounts at the school to which he/she is assigned.
- V. **Other Documents.** School principals and department heads are authorized to sign all BCSD purchase orders, payment requests, timesheets, stipend requests and absentee forms. In the event of a planned absence of the Principal or department head, a letter must be forwarded to the Chief Operational Services Officer authorizing another administrator to sign financial documents during a specified period of time.
- VI. The Superintendent or his/her designee may sign financial documents on behalf of school principals and department heads.

Adopted: July 12, 2001
Revised: June, 2015

AUTHORIZED SIGNATURES

Admin. Reg. OS-9
January, 2015

- I. **Purpose.** To establish the basic structure for the signing of checks drawn on the Beaufort County School District and the district's schools' accounts and for the signing of other internal, finance-related documents.
- II. The superintendent is authorized by the board of education to sign payroll and accounts payable checks. All contracts in excess of \$2500 must be signed by the superintendent. Only chief officers may sign contracts up to \$2500. No other staff, including principals, have authority to sign contracts.
- III. Each of the district's school principals is authorized by the superintendent to sign checks on his/her school's accounts. In case of emergency and with prior approval by the district's chief operational services officer, an assistant principal will be authorized to sign checks on his/her school's accounts.
- IV. School principals and department heads must sign all district purchase orders, payment requests, timesheets, stipend requests and absentee forms. In the event of a planned absence of the principal or department head, a letter must be forwarded to the chief operational services officer authorizing another administrator to sign financial documents during a specified period of time.
- V. The Superintendent or his/her designee may sign financial documents on behalf of school principals and department heads.

Adopted: July 12, 2001
Revised: October, 2014

FISCAL ACCOUNTING AND REPORTING

Admin. Reg. OS-10
June, 2015

- I. **Purpose.** To establish the Superintendent's expectations for accounting for and reporting of the financial resources of the Beaufort County School District.
- II. **BCSD Accounting System.** The BCSD accounting system will provide an accurate record of financial transactions. The Chief Operational Services Officer ("COSO") shall maintain accounting procedures adequate to properly record all BCSD financial transactions in accordance with the financial accounting handbook developed by the South Carolina Department of Education.
- III. **Responsibility for Proper Accounting.** The Superintendent, by and through the COSO, is ultimately responsible for receiving and properly accounting for all BCSD funds.
- IV. **Quarterly Financial Statements.** The Superintendent or COSO will present the Board with quarterly financial statements providing an up-to-date report on expenditures and receipts as well as the BCSD financial condition.
- V. **Posting of Annual Financial Reports.** Annual financial reports shall be prepared and posted to the BCSD website. Bound copies will be distributed to the Superintendent, Board members, finance staff and interested community members.

Adopted: July 12, 2001

Revised: June, 2015

Legal references:

- A. S. C. Code, 1976, as amended:
 1. Section 59-13-60 - Spending priority; audits; reports; Education Finance Review Committee.
 2. Section 59-20-80 - School budgets will be made public; itemization of salaries.
- B. State Board of Education Regulations:
 1. R-43-172 - Accounting and reporting.
 2. R-43-231 - Defined program grades K-five.
 3. R-43-234 - Defined program, grades 9-12.

OS - 10 FISCAL ACCOUNTING AND REPORTING

Purpose: To establish the superintendent's expectations for accounting for and reporting of the financial resources of the Beaufort County School District.

The district's accounting system will provide an accurate record of financial transactions. The chief operational services officer (COSO) will maintain accounting procedures adequate to properly record all financial transactions in accordance with the financial accounting handbook developed by the South Carolina Department of Education.

The superintendent is ultimately responsible for receiving and properly accounting for all funds of the district.

The superintendent or COSO will present the board of education with quarterly financial statements providing an up-to-date report on expenditures and receipts as well as the financial condition of the district.

Annual financial reports will be prepared and posted to the district's website and bound copies will be distributed to the superintendent, board members, finance staff and interested community members.

Adopted 7/12/01; Revised 10/14

Legal references:

- A. S. C. Code, 1976, as amended:
 - 1. Section 59-13-60 - Spending priority; audits; reports; Education Finance Review Committee.
 - 2. Section 59-20-80 - School budgets will be made public; itemization of salaries.
- B. State Board of Education Regulations:
 - 1. R-43-172 - Accounting and reporting.
 - 2. R-43-231 - Defined program grades K-five.
 - 3. R-43-234 - Defined program, grades 9-12.

OS - 11 INVENTORIES

Purpose: To establish a basic structure for the accurate inventory of Beaufort County School District property.

The superintendent is responsible for setting up and maintaining an asset inventory system that preserves an accurate record and inventory of materials, equipment and real estate in the district.

The Finance Department is responsible for providing a fixed asset listing to each school/department on an annual basis. The district's fixed assets accountant is responsible for monitoring the district's property records and insuring compliance with policy and current regulations.

It is the responsibility of each department head and school principal to maintain the accuracy of the fixed assets within the jurisdiction of his/her school or department. The fixed asset listing will be reviewed by the principal/department head or his/her designee. Any variances should be noted on the listing and a copy returned to the Finance Department. Any disposals of assets must be communicated to the Finance Department using the Fixed Assets Disposal form which is available on the School District's website.

Each year prior to the closing of school, the principal of each school will arrange for an inventory of textbooks. Any shortfalls or adjustments should be coordinated through the Instructional Services Department.

Title I schools must maintain an inventory of items purchased with Title I funds costing more than \$200. This Title I inventory must be maintained even if the school no longer qualifies for Title I status.

Adopted 7/12/01; Revised 11/2014

Legal references:

- A. State Board of Education Regulations:
 - 1. R 43-172 - Accounting and reporting.

INVENTORIES

Admin. Reg. OS-11
June, 2015

- I. **Purpose.** To establish a basic structure for the accurate inventory of Beaufort County School District property.
- II. **Asset Inventory System.** The Superintendent is responsible for setting up and maintaining an asset inventory system preserving an accurate record and inventory of BCSD materials, equipment and real estate.
- III. **Provision of Fixed Asset Listings.** The Finance Department shall provide annually a fixed asset listing to each school and department. The BCSD fixed assets accountant shall be responsible for monitoring the BCSD property records and insuring compliance with policy and current regulations.
- IV. **Responsibilities of Principals and Department Heads.** It shall be the responsibility of each department head and school principal to maintain the accuracy of the fixed assets within the jurisdiction of his/her school or department. Upon receipt from the Finance Department representative, the fixed asset listing shall be reviewed by the principal or department head or his/her designee. Any variances should be noted on the listing and a copy returned to the Finance Department. Any disposals of assets must be communicated to the Finance Department using the Fixed Assets Disposal form available on the BCSD website.
- V. **Annual Textbook Inventory.** Each year, prior to the closing of school, the principal of each school shall arrange for an inventory of textbooks. Any shortfalls or adjustments shall be coordinated through the Instructional Services Department.
- VI. **Title I Schools.** Title I schools shall maintain an inventory of items purchased with Title I funds costing more than \$200.00. This Title I inventory must be maintained even if the school no longer qualifies for Title I status until the assets are disposed.

Adopted: July 12, 2001
Revised: June, 2015

Legal references:

- A. State Board of Education Regulations:
 1. R 43-172 - Accounting and reporting.

OS - 12 AUDITS/FINANCIAL MONITORING

Purpose: To establish the basic structure for auditing and monitoring the financial activities of the Beaufort County School District.

In accordance with state law and regulation, all district financial records will be audited following the close of each fiscal year.

The board of education will employ a certified public accountant in accordance with the Procurement Code as recommended by the Finance and Operations committee to conduct the annual audit. The auditing firm must be certified public accountants and should have appropriate experience in the audit of governmental units, specifically school districts in the state of South Carolina.

The completed audit will be presented first to the Finance and Operations committee and then to the board and the public at a regularly scheduled board meeting. The board will make copies available to the public and the media.

The district will forward a copy of appropriate audits to the state department of education and other entities as required by applicable state law or regulations.

The school funds in the district will also be audited annually.

Adopted 7/12/01; Revised 11/2014

Legal references:

A. S. C. Code, 1976, as amended:

1. Section 59-17-100 - Districts to provide state department of education with copies of audit reports.
2. Section 59-13-60 - Spending priority; audits; reports; Education Finance Review Committee.
3. Section 59-20-60 - Audit requirements of the Education Finance Act.
4. Section 59-20-80 - School budgets will be made public; itemization of salaries.

B. State Board of Education Regulations:

1. R-43-172 - Accounting and reporting.
2. R-43-231 - Defined program grades K-five.
3. R-43-234 - Defined program, grades 9-12.

AUDITS AND FINANCIAL MONITORING

Admin. Reg. OS-12
June, 2015

- I. **Purpose.** To establish the basic structure for auditing and monitoring the financial activities of the Beaufort County School District.
- II. **Annual Audit.** In accordance with state law and regulation, all BCSD financial records shall be audited following the close of each fiscal year.
- III. **Employment of Outside Auditor.** The Board shall employ a certified public accountant or accounting firm comprised of certified public accountants in accordance with the Procurement Code as recommended by the Board Finance and Operations Committee to conduct the annual audit. The selected auditing firm shall have appropriate experience in the audit of governmental units, specifically school districts in the State of South Carolina and be conducted in accordance with State Department of Education requirements. Only certified public accountants shall conduct the annual audit.
- IV. **Board Review of Audit.** The completed audit will be presented first to the Board Finance and Operations Committee. After review by the Finance and Operations Committee, the audit shall be presented to the Board and the public at a regularly scheduled board meeting. The Board will make copies available to the public and the media.
- V. **Provision of Audit to Department of Education.** The Chief Operational Services Officer, or his/her designee, shall forward a copy of appropriate audits to the state department of education and other entities as required by applicable state law or regulations.

Adopted: July 12, 2001

Revised: June, 2015

Legal references:

- A. S. C. Code, 1976, as amended:
 1. Section 59-17-100 - Districts to provide state department of education with copies of audit reports.
 2. Section 59-13-60 - Spending priority; audits; reports; Education Finance Review Committee.
 3. Section 59-20-60 - Audit requirements of the Education Finance Act.
 4. Section 59-20-80 - School budgets will be made public; itemization of salaries.
- B. State Board of Education Regulations:
 1. R-43-172 - Accounting and reporting.
 2. R-43-231 - Defined program grades K-five.
 3. R-43-234 - Defined program, grades 9-12.

OS - 12 - R AUDITS/FINANCIAL MONITORING

The district procures the services of a professional auditing firm for the primary purposes of examining documents, records, reports, systems of internal control and accounting, and the financial transactions of the district for the fiscal year which begins July 1 and ends June 30.

The financial transactions of the district are centralized at the district office. This includes the transactions of club accounts and various other activity accounts, as well as the cafeteria operations. The district records financial transactions in one of eight funds maintained by the district.

- general fund
- special revenue fund
- Education Improvement Act fund
- debt service fund
- capital projects fund
- food service fund
- internal service fund
- student activities fund

The proposal and plan for the annual audit must provide for the following:

- Scope - Indication and description of the financial operations to be included in the audit and any specified limitations imposed on the procedures to be carried out by the auditor.
- Schedule - Statement of the date the audit is to begin, the anticipated completion date and the date the audit report is to be delivered.
- Compensation - The proposal must specify the basis of compensation for professional audit services. The terms, conditions and time of payment must be stated. There should be provisions for additional compensation in the event unforeseen situations requiring services of a special nature arise during the audit.
- Management letter - As a part of the audit, the audit firm will render a management letter disclosing and describing any deficiencies in the financial operations of the district and any necessary corrective measures the district should implement.

Proposals for an auditing firm will be secured in accordance with the District's Procurement Code using the audit committee as the selection committee. A selection will be made based on the professional competence and appropriate experience of the various auditing firms.

Issued 11/2014

OS - 13 PROCUREMENT/PURCHASING

Purpose: To establish the basic structure for the expenditure of Beaufort County School District funds.

The procurement staff shall:

- Place the interests of the school system and the improvement of its educational program foremost in all activities.
- Make every effort to obtain the greatest value for every dollar spent.
- Give all responsible bidders equal consideration and assurance of unbiased judgment in determining whether their products meet specifications and the educational needs of the school system.
- Discourage the offer of, and decline, gifts from vendors or potential vendors.
- Provide a prompt and courteous reception, as conditions permit, to all who call on the procurement department on legitimate business interests.

It is the expectation of the superintendent that all matters involving purchasing will be conducted in accordance with the district's procurement code, adopted July 1985, and revised as necessary. A copy of the procurement code can be found in the district's purchasing office and on the district website.

The chief operational services officer (COSO) is responsible for the district's overall compliance with the procurement code.

Reporting to the financial services officer (FSO), the purchasing department is responsible for the application of the procurement code in the district's purchasing processes. The procurement office will do the following.

- Ensure adherence to and compliance with the district's procurement code.
- Monitor district expenditures for compliance with board of education policies and procedures.
- Maximize the value of the district's expenditures.
- Write and issue all district procurement solicitations, including construction projects, such as requests for proposal (RFP), requests for quotation (RFQ), etc.
- Review all contracts and recommend contracts with a value greater than \$2,499.99 for the superintendent's signature.
- Administer contracts.
- Review all requisitions and issue purchase orders.
- Oversee the district's purchasing card program and all equipment rental contracts.

Except as otherwise required by law, the Board delegates to the Superintendent the authority to award contracts for the purchase of equipment, material and supplies in any amount, as long as the purchase is within the remaining funds in the allocated budget for the current fiscal year. The Superintendent may seek Board approval for certain expenditures. The purchasing officer and any additional staff deemed appropriate by the Superintendent will review submissions of bids, proposals or quotes to determine if they are responsive to the district's specifications, and will make recommendations to the Superintendent. The Superintendent or designee will award the contract based upon such recommendations or will make a recommendation to the Board for award of the contract by the Board in accordance with this policy.

Except in special circumstances, district division chiefs and/or officers, or their designees, will be responsible for management of contractors that fall within their department's jurisdiction. The district's procurement office will assist in the administration of contracts.

Beaufort County Board of Education

PROCUREMENT AND PURCHASING

Admin. Reg. OS-13
June, 2015

- I. **Purpose.** To establish the basic structure for the expenditure of Beaufort County School District funds.
- II. **Superintendent's Expectations.** It is the Superintendent's expectation that all matters involving purchasing shall be conducted in accordance with the BCSD procurement code, adopted July 1985, and revised as necessary. The Chief Operational Services Officer ("COSO") shall be responsible for compliance with the BCSD procurement code. A copy of the procurement code may be found in the BCSD procurement office and on the BCSD website.
- III. **Expectations of Procurement Staff.** The procurement staff shall:
 - A. Place BCSD interests and the improvement of its educational program foremost in all activities.
 - B. Make every effort to obtain the greatest value for every dollar spent.
 - C. Give all responsible bidders equal consideration and assurance of unbiased judgment in determining whether their products meet BCSD specifications and educational.
 - D. Discourage the offer of, and decline, gifts from vendors or potential vendors.
 - E. Provide a prompt and courteous reception, as conditions permit, to all who call on the procurement department on legitimate business interests.
- IV. **Responsibilities of Procurement Department.** The BCSD procurement department shall be responsible for applying the BCSD procurement code to and in the BCSD procurement processes. The BCSD procurement department will do the following:
 - A. Ensure adherence to and compliance with the BCSD procurement code.
 - B. Monitor BCSD expenditures for compliance with Board policies and procedures.
 - C. Maximize the value of the BCSD expenditures.
 - D. Write and issue all BCSD procurement solicitations, including but not limited to construction projects, such as requests for proposal (RFP), requests for quotation (RFQ).
 - E. Review all BCSD contracts and recommend contracts with a value of \$2,500.00 and greater for the Superintendent's signature.
 - F. Administer BCSD contracts.
 - G. Review all requisitions and issue purchase orders.
 - H. Oversee the BCSD purchasing card program and all equipment rental contracts.
- V. **Delegation of Authority to Award Contracts.** Except as otherwise required by law, the Board delegates to the Superintendent the authority to award BCSD contracts for the

OS - 13 - R(1) PROCUREMENT/PURCHASING

Competitive food sales/vending machines

Because the district neither expends nor receives funds from contracts with vendors that supply beverage and snack vending machines installed on school premises, the district's procurement office does not solicit contracts for these services. At his/her discretion, each school principal may independently pursue and recommend for the superintendent's signature contracts for vending machines for his/her school. These guidelines will be followed.

- If vending machines are desired, each school principal must solicit vendor proposals for his/her school's vending machines only after seeking authorization from the procurement office.
- Only district high schools are permitted to allow student access to vending machines.
- Vending machine sales to students are strictly prohibited during the breakfast serving period and from one hour prior to the first lunch period until one hour after the final lunch period.
- Regarding beverage and snack content, all vending machine sales to students will comply with the district's wellness policy SS-42.
- All vending machine content must also comply with the national school beverage guidelines published by the American Beverage Association and the Alliance for a Healthier Generation and the school snacks guidelines published by USDA.
- All vending machine commissions and compensation incentives received by each school will be deposited into the school's student activity account and reported to the finance department with other financial activities at the usual times.
- Principals will adhere to board and district policies and rules prohibiting payoffs and kickbacks in conducting district business.

Issued 11/2014

**PROCUREMENT AND PURCHASING
COMPETITIVE FOOD SALES/VENDING MACHINES**

**Admin. Reg. OS-13-R(1)
June, 2015**

- I. Guidelines for Competitive Food Sales and Vending Machine Bidding in Schools.** Because the BCSD does not expend or receive funds from contracts with vendors supplying beverage and/or snack vending machines installed on school premises, the BCSD procurement office does not solicit contracts for these services. At his/her discretion, each school principal may independently pursue and recommend for the Superintendent's signature contracts for vending machines for his/her school using the following guidelines:
- A. If vending machines are desired, each school principal must solicit vendor proposals for his/her school's vending machines only after seeking authorization from the BCSD procurement office.
 - B. Only BCSD high schools are permitted to allow student access to vending machines.
 - C. Vending machine sales to students are strictly prohibited during the breakfast serving period and for one (1) hour prior to the first lunch period until one (1) hour after the final lunch period.
 - D. Regarding beverage and snack content, all vending machine sales to students will comply with the BCSD wellness policy, AR SS-42.
 - E. All vending machine content must also comply with the national school beverage guidelines published by the American Beverage Association and the Alliance for a Healthier Generation and the school snacks guidelines published by USDA.
 - F. All vending machine commissions and compensation incentives received by each school will be deposited into the school's student activity account and reported to the BCSD finance department with other financial activities at the usual times.
 - G. Principals will adhere to Board and BCSD policies and rules prohibiting payoffs and kickbacks in conducting BCSD business.

Adopted: November, 2014
Revised: June, 2015

**PROCUREMENT AND PURCHASING
COMPETITIVE FOOD SALES/VENDING MACHINES**

**Admin. Reg. OS-13-R(1)
June, 2015**

- I. Guidelines for Competitive Food Sales and Vending Machine Bidding in Schools.** Because the BCSD does not expend or receive funds from contracts with vendors supplying beverage and/or snack vending machines installed on school premises, the BCSD procurement office does not solicit contracts for these services. At his/her discretion, each school principal may independently pursue and recommend for the Superintendent's signature contracts for vending machines for his/her school using the following guidelines:
- A. If vending machines are desired, each school principal must solicit vendor proposals for his/her school's vending machines only after seeking authorization from the BCSD procurement office.
 - B. Only BCSD high schools are permitted to allow student access to vending machines.
 - C. Vending machine sales to students are strictly prohibited during the breakfast serving period and for one (1) hour prior to the first lunch period until one (1) hour after the final lunch period.
 - D. Regarding beverage and snack content, all vending machine sales to students will comply with the BCSD wellness policy, AR SS-42.
 - E. All vending machine content must also comply with the national school beverage guidelines published by the American Beverage Association and the Alliance for a Healthier Generation and the school snacks guidelines published by USDA.
 - F. All vending machine commissions and compensation incentives received by each school will be deposited into the school's student activity account and reported to the BCSD finance department with other financial activities at the usual times.
 - G. Principals will adhere to Board and BCSD policies and rules prohibiting payoffs and kickbacks in conducting BCSD business.

Adopted: November, 2014
Revised: June, 2015

PROCUREMENT AND PURCHASING

MINORITY/WOMEN BUSINESS ENTERPRISE UTILIZATION PLAN

Admin. Reg. OS-13-R(2)

June, 2015

- I. **Purpose.** Because the Board believes it is in the best interest and long-term benefit to the community and the BCSD to ensure minority and women-owned business enterprises (M/WBE) have meaningful opportunities to participate in the BCSD district's procurement process, and to minimize disparities between contract awards for BCSD purchases of goods and services to M/WBEs and non-minority business enterprises, at the Board's direction, the Superintendent and BCSD administration will be guided by the following principles:
- A. In conformance with state laws and regulations, the BCSD will encourage and promote maximum opportunity for and participation by qualified M/WBEs in the BCSD procurement and contract award process.
 - B. The BCSD will regularly review, develop and implement such additional rules and standards as to promote and afford M/WBE's the opportunity to participate fully in the BCSD procurement process.
 - C. The BCSD will establish progressive annual objectives and implementation measures for increased participation by M/WBEs.
- II. **Definitions.** The definitions set forth in S.C. Code Ann. § 11-35-5010 shall apply to this administrative rule.
- III. **State Certification.** A business seeking certification as an M/WBE must be certified to determine the enterprise's ownership by minorities and/or women based on the definitions in this rule. Businesses seeking certification should contact the following.

Governor's Office of Small and Minority Business Assistance
Division of Rural Development
Edgar A. Brown Building
1205 Pendleton Street, Suite 440-A
Columbia, SC 29201

Telephone: (803) 734-0507

Facsimile: (803) 734-2498

www.oepp.sc.gov/osmba

IV. Procurement Formats.

- A. The BCSD shall evaluate all projects and/or anticipated contracts prior to bid in accordance with the strategies contained in this regulation to reduce the size and/or scope, determine exemptions and foster open competition to afford opportunities for M/WBE participation.
- B. The following are options for determining size and/or scope:
 - 1. The full quantity of a given item on a large contract may be placed on a separate contract for bidding.

contract goals, and contractors shall report on their use of minority subcontractors in their monthly reports to the BCSD.

2. Education. The BCSD shall design and present annually an education program for M/WBEs that fosters awareness of the BCSD processes and requirements and helps raise the chances of success among new potential business enterprises in BCSD procurements.
 3. Publications. The BCSD shall notify M/WBE-related organizations of and advertise BCSD procurements, including capital improvement programs, in such a manner as to attract notice by and participation of M/WBEs. Whenever possible, the BCSD shall provide M/WBEs and M/WBE-related organizations with advance notice of upcoming projects and anticipated bid dates.
- B. At a minimum, the BCSD shall advertise its solicitations in the following publications and sites.
1. Bluffton Today
 2. Beaufort Gazette
 3. Island Packet
 4. South Carolina Business Opportunities
 5. Black Chamber of Commerce
 6. Beaufort Chamber of Commerce
 7. district's website

VIII. Reporting Requirements and Office of Contract Compliance.

- A. In accordance with the BCSD procurement code, the Superintendent shall annually provide a written report to the Board that includes the number and dollar value of contracts and purchase orders awarded to certified and non-certified, South Carolina-based M/WBEs during the prior twelve months.
- B. The Superintendent shall establish and continuously maintain an office of contract compliance that is responsible for the development, administration and management of the BCSD M/WBE rule.
- C. The office of contract compliance will oversee, prepare and review all BCSD contracts for use of best business practices, management standards, legal requirements and risk/insurance requirements.

Adopted: September 5, 2006
Revised: June, 2015

OS - 13 – R 2) PROCUREMENT/PURCHASING

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Minority/Women Business Enterprise (M/WBE) utilization plan

Because the board of education believes it is in the best interest and long-term benefit to the community and the district to ensure minority and women-owned business enterprises (M/WBE) have opportunities to participate in the district's procurement process, and to minimize disparities between contract awards for the district's purchases of goods and services to M/WBEs and non-minority business enterprises, at the board's direction, the superintendent and district administration will be guided by the following principles.

- In conformance with state laws and regulations, the district will encourage and promote maximum opportunity for and participation by qualified M/WBEs in the district's procurement and contract award process.
- The district will regularly review, develop and implement such additional rules and standards as to promote and achieve the board's M/WBE policies.
- The district will establish progressive annual objectives and implementation measures for increased participation by M/WBEs.

Definitions

The definitions used in this plan are taken from Section 11-35-5010, Code of Laws of South Carolina (1976), as amended.

"Minority person" for the purpose of this article, means a United States citizen who is economically and socially disadvantaged.

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- "*Socially disadvantaged individuals*" means 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 or designated agency.
- "*Economically disadvantaged individuals*" means 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.

A "*socially and economically disadvantaged small business*" means any small business concern which is as follows.

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- Is at least 51 percent owned by one or more citizens of the United States who are determined to be socially and economically disadvantaged.
- In the case of a concern which is a corporation, 51 percent of all classes of voting stock of such corporation must be owned by an individual determined to be socially and economically disadvantaged.
- In the case of a concern which is a partnership, 51 percent of the partnership interest must be owned by an individual or individuals determined to be socially and economically

Beaufort County Board of Education

PAGE 2 - OS - 13 – R (2) PROCUREMENT/PURCHASING

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 concerned.

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State certification

A business seeking certification as an M/WBE must be certified to determine the enterprise's ownership by minorities and/or women based on the definitions in this rule. Businesses seeking certification should contact the following.

Governor's Office of Small and Minority Business Assistance
Division of Rural Development
Edgar A. Brown Building
1205 Pendleton Street, Suite 329440-A
Columbia, SC 29201

Telephone: (803) 737-0657/734-0507
Facsimile: (803) 734-2498
www.oepb.sc.gov/osmba

Procurement formats

The district will evaluate all projects and/or anticipated contracts prior to bid in accordance with the strategies contained in this regulation in order to reduce the size and/or scope, determine exemptions and foster open competition to meet the board's M/WBE goals.

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The following are options for determining size and/or scope.

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- The full quantity of a given item on a large contract may be placed on a separate contract for bidding.
- A partial quantity of a given item on a large contract may be placed on a separate contract for bidding.
- The term of the contract may be shortened, resulting in a dual effect of reduction of the quantities required, and reduction of the risk inherent in guaranteeing prices over a longer time period.
- Work to be performed may be grouped according to geographic location and placed on separate contracts.
- Unrelated scopes of work to be performed or portions not requiring completion by a single bidder may be placed on separate contracts.
- ~~The superintendent or her/his designee may select certain procurement opportunities for solicitation to M/WBEs to achieve the goals of this rule. The procurement document will identify these opportunities as designated for disadvantaged business solicitation.~~

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The reduction of projects will be based on the following criteria.

- complexity of the project's design and the ease of breaking it into smaller components without affecting overall project quality
- availability of M/WBEs that might participate, especially within a specific specialty or trade

Beaufort County Board of Education

PAGE 3 - OS - 13 – R (2) PROCUREMENT/PURCHASING

- extent to which the stated goals of this rule are being met within any annual period
- potential cost/benefit of reducing the project

~~Procurements for projects and/or services with potential contract or contracts in aggregate for one scope of work offering of up to \$15,000 are exempt from this rule. However, the district's purchasing department will monitor and keep written records of these exemptions, and the superintendent will report them to the board quarterly.~~

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M/WBE opportunity notice

~~Through its advertisements, contract documents and boilerplate specifications, the district will provide this M/WBE rule to all potential contracting entities. Every responding vendor's proposed price quote and offering must include the name and identification of any and all M/WBE contractors, subcontractors and suppliers as part of the vendor's bid. When this documentation is missing from the vendor's bid, the district's purchasing department will deem the bid to be materially insufficient and disqualify the vendor's bid from further consideration.~~

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Subcontracting to a governmental body

As defined in Article 21, 11-35-5230(B) of the State Consolidated Procurement Code, firms with state contracts that subcontract with minority firms ~~will may~~ be eligible for an income tax credit equal to four percent of the payments for minority subcontractors for work pursuant to state contract. To be eligible for the four percent income tax credit, subcontracting firms must be certified by the Office of Small and Minority Business Assistance ~~small and minority business assistance office~~ as a minority firm. Information pertaining to the income tax credit can be obtained from the South Carolina Tax Commission or the Office of Small and Minority Business Assistance ~~small and minority business assistance office~~.

District assistance to minority/women and small business enterprises

To assist in the accomplishment of its M/WBE goals, the district will make available various resources as follows.

- ~~Referral service - The district will maintain a reference file of federal, state and other organizations that provide assistance and business training to small and minority businesses. This reference file will be made available to minority firms upon request.~~
- ~~Split projects - The district will provide minority subcontractors an opportunity to bid on renovation projects that are coordinated by the district's maintenance department. The district will invite M/WBE firms on the district maintained "active" list to participate in bids on projects for which the firm qualifies.~~
- Contractor and subcontractor requirements - The district will provide clear and timely instructions to contractors regarding the use of minority subcontractors. District solicitations will require all bidders to address the district's requirements regarding the use of minority contractors and subcontractors. The district will make utilization of minority subcontractors part of the contractors' overall contract goals, and contractors will report on their use of minority subcontractors in their monthly reports to the district.
- Education - The district will design and present semi-annually an education program for M/WBEs that fosters awareness of the district's processes and requirements and helps raise the chances of success among new potential business enterprises in district procurements.

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Beaufort County Board of Education

PAGE 4 - OS - 13 – R (2) PROCUREMENT/PURCHASING

- Publications - The district will notify M/WBE-related organizations of and advertise district procurements, including capital improvement programs, in such a manner as to attract notice by and participation of M/WBEs. Whenever possible, the district will provide M/WBEs and M/WBE-related organizations with advance notice of upcoming projects and anticipated bid dates.

At a minimum, the district will advertise its solicitations in the following publications and sites.

- Bluffton Today
- Beaufort Gazette
- ~~Dodge Hill Report~~
- ~~Gullah Sentinel~~
- Island Packet
- ~~Post and Courier~~
- Savannah Morning News
- South Carolina Business Opportunities
- ~~The State~~
- Black Chamber of Commerce
- Beaufort Chamber of Commerce
- ~~Greater Hilton Head Chamber of Commerce~~
- district's website

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Reporting requirements and office of contract compliance

The superintendent will semi-annually provide a written report to the board that includes the number and dollar value of contracts and purchase orders awarded to certified and non-certified, South Carolina-based M/WBEs during the prior six months.

The superintendent will establish and continuously maintain an office of contract compliance that is responsible for the development, administration and management of the district's M/WBE rule.

The office of contract compliance will oversee, prepare and review all district contracts for use of best business practices, management standards, legal requirements and risk/insurance requirements.

~~The contracting compliance officer will be in charge of the office of contract compliance. In addition to the duties described above, this individual will serve as the district's M/WBE liaison designate with responsibilities to lead, direct and promote the district's M/WBE throughout the district.~~

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Issued 9/5/06; Revised 11/21/04

OS - 14 SALES CALLS AND DEMONSTRATIONS

Purpose: To establish the superintendent's expectations for sales calls and demonstrations on Beaufort County School District staff.

Solicitation on School Property: No person, firm, corporation, or business shall enter school property for any purpose of selling, trading, or bartering merchandise of any kind to a student, employee, school club, or student organization, nor shall any of the above enter upon school property for the purpose of soliciting money from a student, employee, school club, or student organization for any purpose other than approved exceptions. The following exceptions may be permitted when approved by the principal unless additional approval is required in the provisions below:

- 1) Fundraisers;
- 2) Sale of approved lunchroom food service vendors;
- 3) Sale of class rings;
- 4) Sale of graduation paraphernalia;
- 5) Agents representing vendors that provide Board of Education approved employee benefits;
- 6) Vendors who the Principal invites to the school to demonstrate merchandise that the school is considering for purchase;
- 7) Partners in Education educational programs and activities (including Artists in Residence);
- 8) Programs and/or activities for employees including those conducted by employees; and
- 9) Vendors providing services for which the school district or school has entered into a contractual or purchasing agreement.

Adopted 7/12/01; Revised 11/2014

SALES CALLS AND DEMONSTRATIONS

**Admin. Reg. OS-14
June, 2015**

- I. Purpose.** To establish the Superintendent's expectations for sales calls and demonstrations to and for Beaufort County School District staff.
- II. Solicitation on School Property.** No person, firm, corporation, or business shall enter BCSD property for any purpose of selling, trading, or bartering merchandise of any kind to a student, employee, school club, or student organization, nor shall any of the above enter upon BCSD property for the purpose of soliciting money from a student, employee, school club, or student organization for any purpose other than approved exceptions. The following exceptions may be permitted when approved by the principal unless additional approval is required in the provisions below:
 - A. Fundraisers;
 - B. Sale of approved lunchroom food service vendors;
 - C. Sale of class rings;
 - D. Sale of graduation paraphernalia;
 - E. Agents representing vendors that provide Board of Education approved employee benefits;
 - F. Vendors who the Principal invites to the school to demonstrate merchandise that the school is considering for purchase;
 - G. Partners in Education educational programs and activities (including Artists in Residence);
 - H. Programs and/or activities for employees including those conducted by employees; and
 - I. Vendors providing services for which the school district or school has enter into a contractual or purchasing agreement.

Adopted: July 12, 2001
Revised: June, 2015

OS - 15 PAYMENT PROCEDURES

Purpose: To establish the superintendent's expectations for payment of Beaufort County School District obligations.

By the authority of the superintendent and at the direction of the chief operational services officer (COSO), the district's accounts payable and payroll divisions of the finance department will receive, hold in custody and expend all funds as directed by the board of education.

The district will make all payment for goods, services and employee payroll only under the following conditions.

- against submitted invoices, properly supported by authorized district purchase orders
- against properly submitted vouchers or invoices covering authorized expenses
- according to the salary schedules or salaries set by the board
- against submitted invoices properly supported by a signed contract

Adopted 7/12/01; Revised 11/2014

Legal references:

- A. S. C. Code, 1976, as amended:
1. Section 11-1-40 - Unlawful to contract in excess of appropriate amount and to divert current funds for payment of prior obligations.
 2. Section 59-10-80 - All employment and purchase contracts require board approval.
 3. Section 59-19-290 - All contracts in excess of apportioned funds are void.

PAYMENT PROCEDURES

Admin. Reg. OS-15
June, 2015

I. **Purpose.** To establish the Superintendent's expectations for payment of Beaufort County School District obligations.

II. **Payment of Obligations.**

A. By the authority of the Superintendent and at the direction of the Chief Operational Services Officer, the BCSD accounts payable and payroll divisions of the finance department will receive, hold in custody and expend all funds as directed by the Board.

B. As set forth in the Finance Accounting Handbook, the BCSD will make all payment for goods, services and employee payroll **only** under the following conditions.

1. against submitted invoices, properly supported by authorized BCSD purchase orders;
2. against properly submitted vouchers or invoices covering authorized expenses;
3. according to the salary schedules or salaries set by the Superintendent and/or Board; or
4. against submitted invoices properly supported by a signed contract.

Adopted: July 12, 2001
Revised: June, 2015

Legal references:

- A. S. C. Code, 1976, as amended:
1. Section 11-1-40 - Unlawful to contract in excess of appropriate amount and to divert current funds for payment of prior obligations.
 2. Section 59-10-80 - All employment and purchase contracts require board approval.
 3. Section 59-19-290 - All contracts in excess of apportioned funds are void.

OS - 16 SALARY DEDUCTIONS DRAFT/10

Purpose: To establish the basic structure for deductions from salaries of Beaufort County School District employees.

All deductions from salary, except for deductions required by law, are subject to approval by the superintendent and are voluntary on the part of the individual employee. The district requires that voluntary deductions be authorized in writing by the employee on a form supplied by the district.

Deductions are required by law

- Social Security
- Medicare
- state and federal income taxes
- state retirement contributions
- garnishments

Deductions allowed by law and approved by the superintendent

- individual and extended family benefits for health insurance
- tax sheltered annuity plans which meet board of education established criteria
- payments to employee credit unions
- state-authorized group survivor monthly income insurance programs and term life insurance

The district will maintain and operate any 403(b) programs pursuant to a written plan. The written plan will contain all the material terms and conditions for eligibility, benefits, applicable limitations, the contracts available under the plan, the time and form under which distributions may be made, and other optional features as appropriate. The district will generally open these programs to all employees and provide notification on an annual basis.

The superintendent will consider approving deductions for charitable organizations only after each organization submits evidence that it has a current 501(c) (3) classification with the Internal Revenue Service.

The district will not make deductions for any organization which is chartered by Section 501(c) (4), (5), or (6) of Title 26 U.S. Code.

The district will not make deductions for any organization whose parent or subsidiary organization fails to meet the requirements herein.

The district will not make any deductions if the proceeds of the deduction would be for the benefit of a labor organization.

Adopted 7/12/01; Revised 11/2014

Legal references:

- A. Federal regulations:
 - 1. 26 CFR 601.201 - Rulings and determination letters.
- B. S. C. Code, 1976, as amended:
 - 1. Section 8-11-91 - Deductions for charitable contributions.
 - 2. Section 8-11-92 - Qualifying criteria for charitable organizations.

SALARY DEDUCTIONS

Admin. Reg. OS-16
June, 2015

- I. **Purpose.** To establish the basic structure for deductions from salaries of Beaufort County School District employees.
- II. **Superintendent Approval.** All deductions from salary, except for deductions required by law, are subject to approval by the Superintendent and are voluntary on the part of the individual employee. The BCSD requires that voluntary deductions be authorized in writing by the employee on a form supplied by the BCSD.
 - A. Deductions required by law:
 1. Social Security;
 2. Medicare;
 3. state and federal income taxes;
 4. state retirement contributions; and
 5. garnishments.
 - B. Deductions allowed by law and approved by the Superintendent:
 1. individual and extended family benefits for health insurance;
 2. tax sheltered annuity plans which meet board of education established criteria;
 3. payments to employee credit unions; and
 4. state-authorized group survivor monthly income insurance programs and term life insurance.
- III. **403(b) Programs.** The BCSD shall maintain and operate any 403(b) programs pursuant to a written plan. The written plan shall contain all the material terms and conditions for eligibility, benefits, applicable limitations, the contracts available under the plan, the time and form under which distributions may be made, and other optional features as appropriate. The BCSD shall open these programs to all employees and provide notification on an annual basis.
- IV. **Charitable Status.**
 - A. The Superintendent may consider approving deductions for charitable organizations only after each organization submits evidence it has a current 501(c)(3) classification with the Internal Revenue Service.
 - B. The BCSD shall not make deductions for any organization which is chartered by Section 501(c)(4), (5), or (6) of Title 26 of the U.S. Code.
- V. **Labor Organization Deductions Prohibited.** The BCSD shall not make any deductions if the proceeds of the deduction would be for the benefit of a labor organization.

Adopted: July 12, 2001
Revised: June, 2015

Legal references:

OS - 17 EXPENSE AUTHORIZATION/REIMBURSEMENT

Purpose: To establish the basic structure for authorizing and reimbursing expenses for Beaufort County School District employees.

The district will reimburse members of the board of education and district employees for work-related expenses incurred during approved travel for the district, such as approved attendance at conferences and other authorized expenses related to the performance of their official duties. The district will not reimburse board members or district employees for any personal expenses incurred during such travel.

The district will reimburse board members and district employees for incurred expenses and travel according to the procedures outlined in the finance department policies and procedures manual.

Employee travel

In district

District employee travel within the district must be approved by the employee's immediate supervisor and will be reimbursed at the district's standard mileage rates and distances.

The district will not reimburse employees for per diem and lodging during travel within the district, unless the employee is an official member of the committee conducting the event. The supervisor must approve the per diem in advance, and the event must require the employee's arrival at the event before 7:00 a.m. and departure after 7:00 p.m. to qualify for per diem and lodging.

Out of district

All work-related district employee travel outside the district requires prior submission of the district's travel request form, including quotes for all travel, per diem, lodging expenses and fees expected to be incurred. The employee must have prior approval by her/his immediate supervisor for out of district travel.

District employees traveling to multiple out of district locations during the same travel occurrence will be governed by the same rules as for travel to separate locations.

Reimbursement for out of district travel (driving) will not exceed the cost of flying to the same designation.

The district will pay, in advance, per diem for meals based on the work-related travel period and the event agenda. The district will pay per diem only for those meals not included in the event agenda and during the work-related travel period. Continental breakfast is considered a meal. In order to receive per diem, an employee must attach a copy of the event agenda with her/his travel request.

Reimbursement Rates

The district's mileage and per diem rates are established by the superintendent and posted on the District's website.

Adopted 7/12/01; Revised 11/2014

EXPENSE AUTHORIZATION AND REIMBURSEMENT

**Admin. Reg. OS-17
June, 2015**

- I. Purpose.** To establish the basic structure for authorizing and reimbursing expenses for Beaufort County School District employees.
- II. Reimbursement of Work-Related Expenses Incurred During Travel.** The BCSD will reimburse members of the Board and BCSD employees for work-related expenses incurred during approved travel for the BCSD, such as approved attendance at conferences and other authorized expenses related to the performance of their official duties. The BCSD will not reimburse Board members or BCSD employees for any personal expenses incurred during such travel.
- III. Finance Department Procedures.** The BCSD shall reimburse Board and BCSD employees for incurred expenses and travel according to the procedures outlined in the finance department policies and procedures manual.
- IV. Employee Travel.**
 - A. In-County Travel.**
 1. BCSD employee travel within Beaufort County must be approved by the employee's immediate supervisor and will be reimbursed at the BCSD standard mileage rates and distances.
 2. The BCSD will not reimburse employees for per diem and lodging during travel within Beaufort County, unless the employee is an official member of the committee conducting the event. The supervisor must approve the per diem in advance, and the event must require the employee's arrival at the event before 7:00 a.m. and departure after 7:00 p.m. to qualify for per diem and lodging.
 - B. Out of County Travel.**
 1. All work-related employee travel outside Beaufort County requires prior submission of the BCSD travel request form, including quotes for all travel, per diem, lodging expenses and fees expected to be incurred. The employee must have prior approval by her/his immediate supervisor for out of county travel.
 2. BCSD employees traveling to multiple out of county locations during the same travel occurrence will be governed by the same rules as for travel to separate locations.
 3. Reimbursement for driving out of county shall not exceed the cost of flying to the same designation.
 4. The BCSD shall pay, in advance, per diem for meals based on the work-related travel period and the event agenda. The BCSD shall pay per diem only for those meals not included in the event agenda and during the work-related travel period. Continental breakfast is considered a meal. In order to receive per diem, an employee must attach a copy of the event agenda with her/his travel request.
- V. Reimbursement Rates.** The BCSD mileage rate is in accordance with the IRS reimbursable rates as published annually. The mileage reimbursement rate and per diem

OS - 18 CASH IN SCHOOL BUILDINGS DRAFT/10

Purpose: To establish the superintendent's expectations for dealing with cash in Beaufort County School District school buildings.

A school principal may not permit cash in excess of \$25 to be kept in her/his school overnight under any circumstances.

The superintendent requires all principals to deposit all school monies on a daily basis, at the end of each school day or after a school event. When necessary in order to comply with this administrative rule, the principal will make arrangements with a local bank for night depository privilege. He/She will use these facilities as events dictate.

A principal who does not abide by this policy will be personally responsible for any loss incurred as a result of her/his failure to make a timely deposit and may be subject to further disciplinary action.

Adopted 7/12/01; Revised 11/2014

CASH IN SCHOOL BUILDINGS

**Admin. Reg. OS-18
June, 2015**

- I. Purpose.** To establish the Superintendent's expectations for dealing with cash in Beaufort County School District school buildings.
- II. Daily Deposits Required.** All principals are required to deposit all school monies on a daily basis, at the end of each school day or after a school event. When necessary in order to comply with this administrative rule, the principal shall make arrangements with a local bank for night depository privilege. He/she shall use these facilities as events dictate. A principal shall not allow cash in excess of \$25.00 to remain in his/her school overnight for any circumstances.
- III. Disciplinary Action.** A principal who does not abide by this policy shall be personally responsible for any loss incurred as a result of her/his failure to make a timely deposit and may be subject to disciplinary action, up to and including dismissal from employment.

Adopted: July 12, 2001
Revised: June, 2015

OS - 19 SCHOOL PROPERTIES DISPOSITION

Purpose: To establish the basic structure for disposal of Beaufort County School District real property that is no longer needed.

Real property

The superintendent will advise the board of education when certain property is no longer needed for public school purposes and recommend the disposition of such real property. That recommendation may be to sell or lease school real property.

The district will consider for sale or other advantageous disposition any real property owned by the district that is no longer being used for school purposes. Any disposal of district real property will be in strict accordance with both state law and the district's fixed assets accounting procedures (available in the district's finance office and on the district's website). The district's intention is to dispose of real property at market value. The superintendent will apply all proceeds of any such sale of real property as directed by the board of education.

The state board of education must approve, in advance and in writing, the reassignment or disposal of parcels of land purchased after 1952 with any state funds.

Personal property

The chief operational services officer will advise the superintendent when certain personal property is no longer needed for public school purposes and recommend the disposition of such property.

Any disposal of district personal property will be in strict accordance with all applicable state and federal laws and regulations and with the district's fixed assets accounting procedures. When permitted by law, assets being disposed of must be sold in a public auction. The superintendent will apply proceeds of any such sale or lease to the district's general or capital projects fund.

Adopted 7/12/01; Revised 11/2014

Legal references:

A. S. C. Code, 1976, as amended:

1. Section 59-19-125 - Leasing school property for particular purposes.
2. Section 59-19-190 - Purchase of land by trustees; reassignment or disposal of land purchased with state funds.
3. Section 59-19-250 - Sale or lease of school property by trustees.

SCHOOL PROPERTIES DISPOSITION

**Admin. Reg. OS-19
June, 2015**

- I. Purpose.** To establish the basic structure for disposal of Beaufort County School District real and personal property no longer needed for public school educational purposes.
- II. Real Property.**
 - A. The Superintendent shall advise the Board when real property is no longer needed for public school purposes and recommend the disposition of such real property. That recommendation may be to sell or lease school real property.
 - B. The BCSD may consider for sale or other advantageous disposition any real property owned by the BCSD that is no longer being used for school purposes. Any disposal of BCSD real property shall be in strict accordance with both state law and the district's fixed assets accounting procedures (available in the district's finance office and on the district's website). The BCSD intention is to dispose of real property, at a minimum, at fair market value. The Superintendent will apply all proceeds of any such sale of real property as directed by the Board.
 - C. The state board of education must approve, in advance and in writing, the reassignment or disposal of parcels of land purchased after 1952 with any state funds.
- III. Personal Property.**
 - A. Principals and departments shall not dispose of property without authorization of the Chief Operational Services Officer.
 - B. Any disposal of BCSD personal property will be in strict accordance with all applicable state and federal laws and regulations and with the BCSD procurement and fixed assets accounting procedures. When permitted by law, assets being disposed of must be sold in a public auction. The Superintendent will apply proceeds of any such sale to the BCSD general or capital projects fund.

Adopted: July 12, 2001
Revised: June, 2015

Legal references:

- A. S. C. Code, 1976, as amended:
 - 1. Section 59-19-125 - Leasing school property for particular purposes.
 - 2. Section 59-19-190 - Purchase of land by trustees; reassignment or disposal of land purchased with state funds.
 - 3. Section 59-19-250 - Sale or lease of school property by trustees.

OS - 20 TRANSPORTATION SERVICES DRAFT/10

Purpose: To establish the superintendent's expectations for transportation services in the Beaufort County School District.

As required by state law, the district provides transportation for all eligible public school students within the district. In addition, the district may purchase and/or lease and maintain fleet vehicles necessary to accomplish its routine business tasks.

The superintendent has assigned management oversight responsibility for the district's transportation services to the district's chief student services office (CSSO) The District may choose to contract transportation services with a qualified vendor.

Student transportation

The South Carolina Department of Education (SDE) has oversight over the transportation of students in public schools. The district will comply with all SDE rules and regulations regarding student transportation and cooperate with the SDE in all matters pertaining to the safe operation of school buses, the assignment of bus routes and stops and the entitlement of students to ride on state and/or district-provided school buses.

In accordance with federal law, the district will also provide transportation to homeless students to and from their school of origin, students transferring from a Title I school identified for school improvement, a student who is a victim of a violent criminal offense occurring in or on the grounds of the school the student attends or a student transferring from a school identified as persistently dangerous for three consecutive years.

Students who travel to and from school on school buses or who make trips in connection with school sponsored activities are under school supervision.

The transportation of students and/or district personnel must comply with the regulations and requirements of the district's fleet safety program in administrative rule OS-20-R.

Contractor personnel, district staff and any other persons who are authorized to operate school buses used in the transportation of students and/or district staff are also subject to the district rules and requirements in OS-20-R.

Fleet vehicles

Purchase and/or lease agreements for fleet vehicles the district uses in its routine business operations are governed by the district's procurement code.

Contractor personnel, district staff and any other persons who are authorized to operate district-owned fleet vehicles are subject to the district regulations and requirements of the district's fleet safety program in OS-20-R.

Adopted 11/2014

Legal references:

A. Federal Law:

Beaufort County Board of Education

(see next page)

EQUIPMENT

**Admin. Reg. OS-20
June, 2015**

- I. Purpose.** To set forth the BCSD expectations for use of BCSD-owned or BCSD-leased property and equipment ("BCSD equipment").
- II. Personal Use of Equipment.** Except as approved by the BCSD, the personal use of BCSD equipment is forbidden. Under no circumstances are employees to use BCSD equipment for financial gain. Equipment and property purchased or leased using BCSD funds is the sole property of the BCSD.
- III. Loaned Equipment.** No BCSD equipment shall be loaned without written authorization from the Chief Operational Services Officer, except under the following conditions:
 - A. BCSD equipment and materials may be used for PTO or SIC meetings.
 - B. BCSD equipment and materials may also be used for public relations presentations in which an employee or Board member is so identified and is explaining a function of the BCSD to a segment of the public.
 - C. School groups composed of students with a faculty sponsor may use BCSD equipment and materials. No rentals may be made for these groups from BCSD funds. Such equipment and materials will be made available to all non-curricular related student groups on the same terms and conditions.
 - D. Professional education groups may use BCSD equipment. The BCSD must be reimbursed for the use of any expendable materials.
 - E. Should a situation arise that does not fit any of the above conditions, the decision whether to allow use of BCSD equipment will be made by the Superintendent or his/her designee.
- IV. Borrowed Equipment.** The BCSD will assume no responsibility for any equipment which is borrowed by staff members in the conduct of their work or for any special project or use in the schools. This is also true of all equipment owned by staff members or left in the buildings during the summer months or during the year. All borrowed property must be returned at the close of each school year. Such responsibility rests definitely upon the staff member(s) involved.
- V. Transfer of Equipment and Property.**
 - A. Furniture or BCSD equipment should not be moved from one (1) school or building to another without permission from the Chief Operational Services Officer. This

OS - 20 - R TRANSPORTATION SERVICES

General standard

Beaufort County School District school personnel and contractors may be authorized to operate district vehicles for the purpose of conducting district business, provided the employee driver is at least 18 years old, has an appropriate and valid U.S. driver's license for the vehicle being driven, has reasonable experience driving the type of vehicle being used, could reasonably be expected to operate the vehicle in a safe and prudent manner, and meets the district's fleet safety program requirements as set forth below.

Compliance with South Carolina law and the district fleet safety program is required for any eligible driver to be authorized to use a district vehicle. Operations is authorized to deny a vehicle to anyone if there is any reason the pool vehicle may not be operated safely. Individual departments may impose additional standards, restrictions or driver education or training requirements. This fleet safety program is in addition to any requirements, standards, operating restrictions or suspensions imposed by law.

Driving record reviews

The district will periodically review the past driving record of current and prospective district employees, volunteers or agents who use the district's vehicles or other vehicles to conduct district business.

Out of state licenses

Unless the district has an employee who resides in the state of Georgia, the district requires that all employees have a valid driver's license for the state of South Carolina. If the employee has resided in South Carolina for less than three years, the employee will need to supply the district with a certified copy of his/her driving record from that state.

Record review

If any one of the following applies, the driver's past three-year driving record will be reviewed to determine compliance.

- Driver is a job applicant or an employee where driving is a condition of employment.
- Driver is requisitioning a district pool vehicle or will be carrying passengers or has had an "at fault" accident in the last year.
- Driver has been convicted of a moving traffic violation or driving under the influence of alcohol or drugs or license has been revoked, barred, denied or suspended.
- Driver has routine access to vehicles for conducting district business.

The district reserves the right to review the driving record of any driver to determine driver eligibility related to any vehicle (owned, non-owned, rented, borrowed, leased or any other vehicle) for which the district may be held legally liable.

Risk management will review driving records annually or semi-annually as required by this policy and when requested by departments on a case-by-case basis. The driving record reviews

PAGE 3 - OS - 20 - R TRANSPORTATION SERVICES

Authorized drivers are **not** consultants or vendors, students or school personnel/contractors visiting from other schools, visiting artists or speakers, members of special event groups, government representatives, members of visiting athletic teams, members of visiting student groups or members of visiting community organizations.

Vehicle pick-up at the DESC - display of license, authorized drivers only

A pool vehicle will not be released to any person other than an authorized, approved driver of the requisitioning department. A pool vehicle will not be released to any person unless the person presents a valid U.S. driver's license that reasonably identifies that person. International driver's licenses will not be accepted.

Driver record review process

Departments, schools and agents are required to submit a list of drivers with license information to risk management annually for those drivers who will have routine access to departmental vehicles. The driving records will be reviewed to determine compliance with the fleet safety driving standards and the department head will be provided with a list of approved drivers. To add employees to their approved driver list, departments should submit new names and driver license information to risk management for review and approval prior to allowing new employees to drive departmental vehicles.

Pool vehicles

Risk management will review the driving record of individuals listed on the requisition as drivers or alternate drivers prior to release of the vehicle. Drivers may be required to sign a statement certifying compliance with the district fleet safety program requirements regarding licensing, convictions, moving violations or accidents.

Vehicle operators/employed to drive

Where driving is a condition of, or a substantial part of employment duties (bus drivers, couriers, maintenance, food service, custodial, operations or 50 percent of time is spent driving), the employee's past three-year driving record will be reviewed for compliance with the driving standards at least annually.

Job applicants

Job applicants must comply with the fleet safety program standards prior to employment and are required to supply the district with a current copy of their three-year driving history from the department of motor vehicles. Individual departments should forward driver record information with a request for review to risk management. The individual department may require more frequent record review and may impose more restrictive standards or require other education or training requirements, other than those provided under this fleet safety program, as a condition of employment.

Authorized passengers

Authorized passengers include those in official district-sponsored or authorized transportation programs and district employees, agents or volunteers while on authorized district business.

Authorized passengers may also include persons who are on campus at the district's request, for example, for potential employment at the district, to provide contracted services or for participation in a district event/program. Other examples of authorized passengers include visiting school personnel/contractors, visiting artists or speakers, government representatives,

PAGE 5 - OS - 20 - R TRANSPORTATION SERVICES

- Any other concerns which may be revealed during the inspection should be documented.

Under no circumstances will students be allowed to ride in the back of a pickup truck.

Approved uses

District vehicles may be used solely for the purpose of conducting district business. Examples of approved uses include the following.

- conducting departmental business
- business errands
- educational field trips when supervised and accompanied by school personnel or a district employee on site
- district-related, sponsored or approved conferences/meetings/events
- use by volunteers in programs sponsored by, directed by or for the sole benefit of the district

Personal liability

In compliance with South Carolina law and district policy, the fleet safety program strictly prohibits the use of district vehicles for personal purposes, vacations or trips or to conduct personal business or for transportation of non-district passengers (except as authorized) or use by family members. Any employee, student or other person who uses district vehicles for personal transportation or other personal purposes is personally liable for any accident which occurs during such personal use.

Accidents

Corrective action, penalties and restrictions

An "at-fault" accident is an accident which results in bodily injury or property damage of more than \$500 (all parties combined) in which the employee driver was more than 50 percent responsible, as determined by the department of risk management. In making the determination of fault, all relevant information including information provided by the adjusting agency, the district driver, others involved in the accident, information provided by witnesses to the accident and information contained in any investigating officer's reports will be considered. If an employee is determined to be at fault, they will be responsible for paying 50 percent of the insurance deductible (not to exceed \$500.)

- After any "at-fault" accident involving a district vehicle, the driver's record will be reviewed for compliance with the driving standards.
- Second "at-fault" accident - Drivers who have a second "at-fault" accident in a district vehicle in a two-year period are prohibited from driving district vehicles for three months following the accident.
- Third "at-fault" accident - Drivers who have three "at fault" accidents in a district vehicle in a three-year period are prohibited from driving district vehicles for one year following the accident.
- Fourth "at-fault" accident - Drivers who have four or more "at-fault" accidents while using a district vehicle in a five-year period will be permanently restricted from driving district vehicles.

PAGE 7 - OS - 20 - R TRANSPORTATION SERVICES

The driver's supervisor must immediately forward the information to risk management. Failure to report accidents, convictions and violations as required may result in the loss of privilege to use district vehicles and disciplinary action.

Hit and run and vandalism are criminal incidents and must be reported to police.

Failure to report an accident or incident of damage as required will be considered in assessing fault to a driver and may result in loss of vehicle, restricted use or assessment of repair costs or insurance deductibles to the department, up to \$500.

Misuse of vehicles

All drivers and departments are expected to properly safeguard the district's vehicles and use them in accordance with district policy and administrative rules. If it is determined that a vehicle is being misused or is at substantially higher risk of theft or damage due to a lack of reasonable precautions by the driver or department, risk management will notify the department. If corrective action is not taken, the department may be required to forfeit use of the vehicle and return it to operations.

In the event any district vehicle is stolen or damaged from misuse or failure to take reasonable safety precautions, is subjected to intentional damage or is allowed to be used in violation of district policy, the driver and or the department may be prohibited from further use of district vehicles and the department will be assessed for actual damage and any associated administrative and remedial costs of up to \$500.

Inspection, service and maintenance policy

District vehicles licensed for operation on public roads are required to be serviced and maintained in accordance with risk management guidelines. Every vehicle must undergo an annual inspection by first vehicle services.

The annual vehicle inspection will focus on areas of the vehicle that directly affect its safe operation including steering, tires, brakes, glass, lights, emissions system and horn. The inspector will provide a written, signed report of the areas/equipment /items inspected, including the date, name of facility and inspector, vehicle make/model and identification number, mileage and notations of operating deficiencies. Provided the vehicle has no operating deficiencies, it will be deemed to have passed the inspection and may be returned to normal usage. Correction of any operating deficiency must be completed within seven calendar days of the inspection. Repairs are to be performed by maintenance or as otherwise approved in this policy. After correction of deficiencies, the vehicle must pass re-inspection.

Risk management guidelines for vehicle service and maintenance include complying with manufacturer's service recommendations; using recommended types of gasoline; maintaining proper fluid levels (oil, antifreeze coolant, brake and transmission, etc.); and ensuring proper tire pressure, working signals, lights (headlamps, turn-signal lights, tail lights, brake lights, etc.), brakes and other vehicle safety items.

Failure to comply with the service, maintenance and inspection requirements of this program may result in suspension of driving privileges, increased insurance charges and/or loss of the vehicle.

Miscellaneous areas

Seat belt use

**BUILDINGS, GROUNDS AND PROPERTY
MANAGEMENT AND MAINTENANCE**

**Admin. Reg. OS-24
June, 2015**

- I. Purpose.** To establish the Superintendent's expectations for the construction, operation and maintenance of the physical infrastructure necessary to provide and support the educational program in the Beaufort County School District ("BCSD").
- II. Superintendent's Responsibilities:**
 - A. The Superintendent shall delegate primary responsibility for the district's facilities construction, operation and maintenance programs to the BCSD Chief Operational Services Officer (COSO). With the Superintendent's approval, the COSO may assign day to day management responsibility for the facilities program to the BCSD facilities planning and construction officer.
 - B. The Superintendent, in consultation with the Board of Education and BCSD administration and staff and in accordance with the BCSD procurement code, may enlist the services of outside entities to assist the BCSD with facilities planning and maintenance.
- III. Facilities Planning, Development and Construction.** In order to provide for the facilities capacities necessary for the delivery of the BCSD educational program in a clean, healthy and safe environment, the BCSD facilities planning and construction officer will do the following:
 - A. Review and project annually for student enrollments and adjust attendance zones to efficiently and wisely use the district's facilities.
 - B. Establish and regularly update a plan for the renovation of existing district facilities and, when required by student enrollment projections, facilities life-cycle determinations, etc., plan for construction of new facilities.
 - C. Report regularly on the BCSD facilities requirements to the COSO, the superintendent and the board.
 - D. Plan for, assist in the development of and manage all of the BCSD construction-related contracts and contractors.
 - E. Develop and maintain community involvement in the BCSD facilities renovation and construction plans through an independent standing capital improvement committee that will monitor and periodically report on the BCSD construction plans and projects and the BCSD expenditure of taxpayer funds for those projects.
- IV. Facilities Operations and Maintenance.** In order to operate and maintain BCSD facilities in a manner that efficiently provides a clean, healthy and safe environment for all BCSD students and staff, the COSO or his/her designee will do the following:-
 - A. Using best management practices, develop, maintain and regularly update a preventive maintenance program to enable BCSD facilities and equipment to reach their intended and usual life expectancies.

**MODIFICATION OR CONSTRUCTION OF FACILITIES
THROUGH USE OF PUBLIC FUNDS**

**Admin. Reg. OS-25
September, 2015**

- I. Required Board Approval.** Board approval must be secured through the BCSD facilities, planning and construction office prior to the initiation of fundraising for the modification to or construction of BCSD facilities. "Modification" includes painting and the attachment of items such as, but not limited to, cabinets to the walls of facilities. It also includes any modification to a school campus, such as gardens and buildings.
- II. Requirements Prior to Modification or Construction.** Before consideration can be given to proposals for the modification or construction of BCSD facilities through the use of private funds, the following issues must be addressed.
 - A. estimated costs that will be incurred by the BCSD if the project is completed;
 - B. effect the completion of the project would have on Title IX compliance; and
 - C. effect the completion of the project would have on the equitable provision of facilities among same-level schools
- III. Requirements for Public Funding.** Unless a specific exception is made by the Board in advance, to be approved, the following must occur.
 - A. Projects must be funded independently of the BCSD;
 - B. Funding must be complete prior to construction;
 - C. Construction must be in compliance with office of school facilities; and
 - D. Naming of the facilities must comply with BCSD policies and rules.

Adopted: September, 2015

BEAUFORT COUNTY SCHOOL DISTRICT

General Maintenance

Request for Building Modification

Cannot be submitted without school Principal's approval

BM#

For FPC Use:

Investigate? ☐ Yes ☐ No

☐ Approved ☐ Denied

CONTACT INFORMATION

Date: _____

School Name: _____ Person Making Request: _____

Phone #: _____ Email Address: _____

Principal's Signature: _____

PROJECT INFORMATION

Project Location (e.g. room number, office number): _____

Describe the project, include drawings and all necessary details: _____

Reason of Project: _____

PROJECT IMPACT:

☐ Power/Phone/Data

☐ Lighting

☐ Security

☐ HVAC

☐ Furniture

☐ Storage

☐ Water/Wastewater

☐ Outdoor Facilities

☐ Others: _____

NOTE: Include areas that may involve storing liquids

FUNDING INFORMATION

Is this project school funded? ☐ Yes ☐ No

If no, indicate the funding source: _____

NOTE: Your funding source must be identified (the account code is not needed at this time). If the project requires asbestos abatement, the school may be required to assume the cost.

ESTIMATE (attach copy of estimate)

Estimate Completed by: _____ Date: _____

Estimate Total Cost: _____ Priority Assigned: _____

Approximate Start: _____ Approximate Completion: _____

APPROVAL

Account Code: _____

FPC Officer Signature: _____

Date: _____

EMAIL THIS REQUEST TO: mary.gillies@beaufort.k12.sc.us

KEY CONTROL

Admin. Reg. OS-26
June, 2015

- I. Purpose.** To establish the superintendent's expectations for the control of keys providing access to Beaufort County School District ("BCSD") facilities.
- II. Policy.** The Superintendent considers it to be the responsibility of the BCSD to promote the security of its personnel and facilities by providing appropriate and controlled access to BCSD properties through the issuance of keys.
- III. Assignment of Responsibility.** The Superintendent assigns to BCSD department heads and school principals the responsibility for the safety and security of BCSD staff and facilities within their area of responsibility; therefore, department heads and school principals will assume the primary administrative duties for the issuance, tracking and return/collection of keys to and from their staff and within their area. The issuance, tracking and return/collection of keys will be in accordance with AR OS-23-R.

Adopted: November, 2014
Revised: June, 2015

KEY CONTROL

Admin. Reg. OS-26-R
June, 2015

- I. **Introduction.** It is the responsibility of Beaufort County School District ("BCSD") to promote the security of its staff and facilities by providing appropriate access to BCSD properties. This administrative rule is designed to facilitate issuance of keys on a need basis, to define responsibility for issuance and collection of keys, and to encourage responsible care of keys by key holders.
- II. **Purpose.** To explain the procedures regarding the issuance, return and control of keys utilized to access BCSD facilities.
- III. **Scope.** This regulation applies to all BCSD departments and activities.
- IV. **Policy.**
 - A. Department head/principal responsibility. BCSD department heads and school principals are responsible for the administration of key issuances and returns within their area of responsibility. The appropriate department head, principal or officer must request all new keys issued from the maintenance locksmith [see AR OS-26-E (1) for a copy of the key request form].
 - B. Key tracking log. The department head or school principal is responsible for ensuring that a log is maintained at all times identifying the specific keys assigned to department staff. The maintenance locksmith will request updated versions of these logs on a periodic basis. The key tracking log should be developed as shown in AR OS-26-E(2).
 - C. Loss of keys. When it is apparent that a key has been lost or stolen, the department head/ principal must notify his/her supervisor and the maintenance director. The departmental key tracking log should be updated to reflect the loss of the key. The maintenance director will discuss the situation with management to determine if rekeying is necessary.
 - D. Security keys. All keys not issued to a specific employee must be appropriately secured. A locked cabinet or safe should be utilized to secure these keys. Keys should be returned to the maintenance director if they are not in use for an extended period of time.
 - E. Audits. The maintenance department will perform periodic audits as deemed necessary to verify the accuracy of logs maintained in each office area. During these audits, the locksmith will also investigate to ensure that spare keys are properly secured. In addition, the internal audit staff may at their discretion perform similar audits regarding key issuance, return and control.
 - F. Grand master keys. Grand master keys provide unlimited access to various BCSD facilities; therefore, grand master keys will be tracked separately by the maintenance department on an individual basis. Grand master keys can only be issued upon the approval of the appropriate officer. Great grand master keys require approval prior to issuance. These keys must be returned directly to the maintenance department when no longer needed or when the employee is no longer employed by the BCSD. Each

- A. BCSD key request form. The BCSD key request form in AR OS-26-E(1) should be used by the appropriate department head/principal to request new keys, to return keys that are no longer needed and to report lost keys to the maintenance department (see instructions for preparation of form).
- B. Key tracking log. Personnel will utilize form OS-26-E(2) to set up a key tracking log. Users may also maintain this information using a software package of the user's choice.

VI. Instructions for preparation of key request form OS-26-E(1).

- A. Purpose. This form is used by department heads/principals to request new keys, to return keys no longer in use and to provide notification of lost keys to the maintenance department.
- B. Where to obtain forms. Forms are available on the BCSD website. Employees may fill out the forms online and print for signature or users may print a blank copy of the forms and then fill out by hand or typewriter. Employees may also maintain this information using a software package of the employee's choice.
- C. Where to send completed forms. Forward BCSD key request form OS-26-E(1) to the maintenance work control desk. Retain a photocopy of the form for departmental records.
- D. Instructions.
 - 1. Information is to be completed by the department head/principal. Instructions are provided only for those items requiring additional explanation.
 - 2. The signature of the department head/principal or designated key control person picking up the keys requested should be entered here at the time the keys are picked up at the maintenance department administrative office. The department will be notified when the keys are ready.
 - 3. The employee picking up the keys should bring an ID card for identification.
- E. Request for keys.
 - 1. Enter the name of the building where keys are to be used.
 - 2. Enter the room number of the doors where keys are to be used. Specify if key request is for an exterior building door.
 - 3. Enter the key number stamped on the key. Employee may leave this blank if he/she is requesting a key and the number is unknown.
- F. Authorization signatures. Obtain appropriate approvals as indicated in policy.

VII. Instructions for preparation for key tracking log OS-26-E(2).

- A. Where to obtain forms. The following options are available.

ENERGY CONSERVATION

Admin. Reg. OS-27
June, 2015

- I. **Purpose.** To establish the superintendent's expectations for conservation of energy in Beaufort County School District facilities.
- II. **Facilities to Exceed Energy Conservation Standards.** All new BCSD facilities and equipment will meet or exceed industry and government energy conservation standards whenever possible within budgetary constraints and limitations.
- III. **Integrating Sustainability Elements.** The BCSD shall design and construct high performing schools integrating various elements of sustainability. Those elements are to include energy management, day lighting, water conservation, improved indoor air quality, and environmentally conscious construction practices. Achievement of LEED (Leadership in Energy and Environmental Design) certification should be an objective for all new construction.
- IV. **Energy Management Plan.** In addition, led by the Chief Operational Services Officer (COSO) or his/her designee, the BCSD will implement an energy management plan with the goals of reducing energy consumption and eliminating wasteful practices in the BCSD use of energy. The COSO or his/her designee will regularly ensure that school principals and district administrators are familiar with and implementing the energy management plan.
- V. **Periodic Review of Energy Use.** The COSO or his/her designee will periodically and regularly review the BCSD energy use practices, update the energy management plan and institute energy saving measures wherever practical.

Adopted: June, 2015

NAMING NEW SCHOOLS, MASCOTS & COLORS

**Admin. Reg. OS-28
June, 2015**

- I. Purpose.** To establish the basic structure for the naming of BCSD facilities and the selection of individual school mascots and colors.
- II. Board Responsibility.** Naming new schools and determining their mascots and colors is the sole responsibility of the Board. The Board will appoint an ad hoc naming committee to suggest possible names, mascots and colors when the need arises.
- III. Schools Eligible for Naming.** A new school is defined as one that has never been included in the BCSD list of schools and whose name the Board has never approved. A school built to replace an existing school will continue to be called by its original name and will maintain its original mascot and colors absent Board action to the contrary.
- IV. Appointment of Board Naming Committee.**
 - A. If building a new school results in the creating of a new attendance area, the Board Chairperson will appoint a naming committee to serve in an advisory capacity.
 - B. The advisory naming committee will include, but is not limited to, the following.
 1. school improvement council members - one from each attendance area;
 2. student representatives such as student council president(s) and/or vice president(s) from the affected attendance area(s) (this may not be appropriate when naming an elementary school);
 3. a total of four community leaders from the attendance area(s);
 4. principals from the affected attendance areas (ex-officio members); and
 5. district office representative (ex-officio members).
 - C. The naming committee will conduct its activities in a manner consistent with the South Carolina Freedom of Information Act.
 - D. The naming committee shall compile a list of potential school names, mascots and school colors. The naming committee will also survey students. The surveys will be advisory in nature and are not to be considered as a vote. The results of the survey will be only one factor that is considered.
 - E. The naming committee shall not include in its list of school names and mascots names to memorialize individuals or endorse a cause or an organization or mascots that are culturally offensive.
 - F. The naming committee shall attempt to achieve and implement uniformity of names within an attendance area, when feasible.
 - G. The naming committee's suggestions will be forwarded to the Board for consideration.

SAFETY/EMERGENCY DRILLS

Admin. Reg. OS-33
September, 2015

- I. Purpose.** To establish the Superintendent's expectations for the practice of safety and emergency drills in Beaufort County School District ("BCSD") facilities.
- II. Role of Protective Services Coordinator.** The BCSD protective services coordinator will ensure that all schools institute and maintain a current safety/emergency plan to provide for the safety and wellbeing of students, staff and visitors in the event of any emergency or disaster, natural or man-made.
- III. Safety/Emergency Drills.** Safety/Emergency drills will be held and reported in accordance with the BCSD safety/emergency procedures and state law. The BCSD protective services coordinator is responsible for monitoring and maintaining the BCSD compliance with the BCSD procedures and state statutes.
- IV. Display of State School Fire Drill Statutes.** The BCSD protective services coordinator will ensure that copies of Section 59-63-910 through Section 56-93-930 of the South Carolina Code, Fire Drills, are printed and displayed in suitable form in at least one conspicuous location in each BCSD school building.

Adopted: September, 2015

Legal references:

- A. S. C. Code, 1976, as amended:**
 1. Section 59-23-210, et. seq. - School building codes, specifications and inspections.
 2. Sections 59-63-910 through 59-63-930 - Fire drills.
- B. State Board of Education Regulations:**
 1. R-43-166 - Student and school safety.
 2. R-43-181 - Building and grounds management - fire prevention.