

POLICY 8.1225

5-C I recommend that the Board approve development of the proposed revised Policy 8.1225, entitled "Instructional Materials Accountability."

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Development

CONSENT ITEM

- This revised policy incorporates the accountability required by the State of Florida for instructional materials.
 - School Principals are required to complete a School Instructional Materials Accountability Plan which designates responsibilities to staff for accountability purposes and which must be reviewed annually.
 - The Destiny Textbook Management System is mandated for the electronic tracking of books. All new instructional materials are to be bar coded and scanned out to students and teachers.
 - Books which can not be electronically tracked are required to be stamped and assigned a unique number, and must be reported on a Damage Report card.
 - A student's instructional material obligations are tracked from grade to grade and school to school until any financial obligation of the student has been satisfied, the student has been suspended from extracurricular participation, or the student has completed community service to repay the obligation.
 - Any discrepancies related to the shipping of textbooks must be reported with in 30 days during the academic school year or 60 days during the months of June and July.
- The revised policy incorporates forms to assist with the accountability process required for instructional materials.

POLICY 8.1225

INSTRUCTIONAL MATERIALS ACCOUNTABILITY

- 1. Purpose.. State law declares that textbooks and other instructional materials are the property of the School Board and "shall be merely loaned to the pupils of the school" and must be returned when the principal or teacher so directs. This Policy clarifies the responsibilities of students, parents/guardians, principals/teachers, and the Superintendent/designees; and provides procedures for the conservation of, accountability for, and collection of instructional materials loaned to students pursuant to Fla. Stat. § 1006.42.
- 2. <u>Responsibilities.</u>-- The general duties of students, parents, principals, and the Superintendent concerning instructional materials shall be as set forth below:
- a. Students.-- Students must recognize that textbooks and other instructional materials are merely loaned to them for use in "pursuing their courses of study and are to be returned at the direction of the principal or the teacher in charge."
 - b. Parents/Guardians.-- Each parent of a student to whom or for whom instructional materials have been issued, is liable for any loss or destruction of, or unnecessary damage to, the instructional materials or for failure of the student to return the instructional materials when directed by the school principal or the teacher in charge, and shall be required to pay for such loss, destruction, or unnecessary damage.
- c. *Teachers.*-- Each teacher shall be accountable for accurate record keeping of instructional materials that are assigned to that teacher's students.
 - d. *Principals*.—Each principal is responsible for:
 - i. Conservation and Accountability: Principals shall ascertain by inspection, and ensure through every available agency, that all books issued to the school by the Superintendent, either in the hands of pupils or in storage, are cared for properly, and "shall see that all books are fully and properly accounted for," as required by Fla. Stat. 1006.28(3)(e). Principals/designees must ensure that instructional materials in storage in schools are kept in a neat, orderly, and safe manner, preferably in the sequence contained in the annual textbook inventory. All reasonable effort shall be made to protect materials against fire, flood, vermin, infestation, and similar damage. Principals/designees shall conduct an inventory of instructional materials assigned to their school at least once per semester.

- 37 ii. *Collection.*-- The school principal shall collect from each student or the student's parent the purchase price of any instructional material the pupil has lost, destroyed, or unnecessarily damaged and report and transmit the money collected to the district school superintendent, pursuant to Fla. Stat. 1006.28(3)(b).
 - e. Superintendent.-- As stated in Fla. Stat. § 1006.28(2)(b), the Superintendent's responsibilities include keeping "adequate records and accounts for all financial transactions for funds collected" from the sale, loss, or damage of instructional materials. The Superintendent and principals shall ensure that all money collected from the loss or damage of instructional materials shall be transmitted to the district school superintendent to be deposited in the district school board fund and added to the district appropriation for instructional materials, as required by Fla. Stat. 1006.28(3)(d).
- 50 3. Debts for Loss, Damage, or Destruction.-- Fla. Stat. 1006.28(3)(b), as interpreted consistent with the exemption under § 1003.62(2) approved by the State Board of Education on February 17, 2004, mandates that:

"The school principal shall collect from each student or the student's parent the purchase price of any instructional material the student has lost, destroyed, or unnecessarily damaged [during the book's first two years of use] and to report and transmit the money collected to the district school superintendent. If instructional materials lost, destroyed, or damaged have been in school use for more than [2] year[s], a sum ranging between 50 and 75 percent of the purchase price of the book shall be collected, determined by the physical condition of the book. The failure to collect such sum upon reasonable effort by the school principal may result in the suspension of the student from participation in extracurricular activities or satisfaction of the debt by the student through community service activities at the school site as determined by the school principal, pursuant to policies adopted by district school board rule."

- 4. Accountability Procedures.— The principal/designee of each school shall complete a School Instructional Materials Accountability Plan (PBSD 1989) to designate school instructional materials accountability responsibilities to selected school staff. A copy of the form is available on the District web page at: http://www.palmbeach.k12.fl.us/Records/PDF/1989.pdf, and is incorporated herein by reference as part of this policy. The Plan will be reviewed annually to ensure that the proper staff members are represented on the Plan. The school principal/designee shall ensure that the following processes and procedures are carried out, according to the Accountability Plan to ensure proper accountability for instructional materials:
 - a. Receipt of Inventory

- i. Receipt of order.-- A location shall be designated in each school to maintain delivery receipts as a record of receiving each order from the Instructional Materials Department.
 - ii. Verification of order.-- Actual quantities received shall be matched to the textbook shipping invoice (TX0097). A copy of this form is contained in the Instructional Materials Department Procedures Manual and can be viewed in Section D of the manual at:

 http://www.palmbeach.k12.fl.us/instructionalmaterialsdept/manual.htm and is incorporated herein by reference as part of this policy.
 - iii. Reporting of shipping discrepancies.-- Any order discrepancies are to be identified on the textbook shipping invoice and faxed to the Instructional Materials Department within 30 days of receipt of the order from August through May, or within 60 days during June and July.
 - iv. Labeling books.-- All books that are not tracked electronically using Destiny Textbook Manager shall be stamped with the school's name on the inside front cover of the book. Each book shall be assigned a unique identification number. Bar-coding may be used as a means of tracking books assigned to students and teachers. Beginning with the 2007-2008 school year, all newly implemented instructional materials shall be bar coded and tracked electronically using the Destiny Textbook Management system. Bar-codes shall be affixed to the inside bottom left front cover. The bar code number shall be the unique book number.

b. Distribution of Inventory

- i. Distribution of student books.—For any materials that are not issued electronically to students. A a Student Textbook Issued Damage Report card (PBSD 0394) shall be completed for each book noting its condition. A copy of this card is contained in the Instructional Materials Procedures Manual and can be viewed in Section E of the manual at: http://www.palmbeach.k12.fl.us/instructionalmaterialsdept/manual.htm and is incorporated herein by reference as part of this policy. Teachers must keep a record of the books issued to students including student names and book numbers along with the student book cards. Beginning with the 2007-2008 school year, all newly implemented instructional materials shall be bar coded and scanned out to students and teachers and tracked electronically using the Destiny Textbook Management system.
- ii. *Distribution of teacher materials.--* Each principal of a school shall designate an instructional materials contact, who shall keep a written <u>or electronic</u> record of materials issued <u>or scanned</u> out to each teacher.

- iii. Distribution of class sets.-- When class sets are used, each teacher is assigned a class set of books, and teachers will assign a copy of the book to a student for each class period. A Textbook Issued Damage Report card (PBSD 0394) shall be completed by each such student in each class. The teacher shall keep a record of the class set book that is assigned to each student. Teachers shall verify that the class set books are returned at the end of each class period.
- iv. Inventory and storage of excess materials.-- A written or electronic record of all excess on-adoption student and teacher materials in storage shall be maintained. After student and teacher materials have been issued, the instructional materials contact shall adjust the TX05 ordering screen (Anticipated Enrollment field) to list excess books for return or exchange.

c. Monitoring of Inventory During the School Year

- i. Notification of parents of textbook procedures.-- Schools should notify parents of this Policy and include information on student and parental responsibilities for textbooks in school handbooks, newsletters, and other communication to parents. During open houses and parent meetings, parents the principal and teachers should shall communicate how books are used to achieve the curricular objectives of the school, as stated in Fla. Stat. § 1006.28(3)(a).
- ii. Periodic book checks.-- Teachers are required to conduct book checks at least once per grading period. Book checks shall be conducted one week prior to the date progress reports are issued. Teachers must fill out PBSD 0395, "Lost/Damaged Materials Notice" for any missing or damaged materials, and submit the form to the instructional materials contact and bookkeeper. A copy of this form is contained in the Instructional Materials Department Manual and can be viewed in Section E of the manual

 http://www.palmbeach.k12.fl.us/instructionalmaterialsdept/manual.htm
 - A. Tracking of obligation status.-- For each grading period, the student's name is added to the school's obligation list if any of his/her books were discovered to be lost or destroyed when the teacher conducted the book check. Schools shall use the TERMS Fees and Fines Program or SIRSI Destiny Textbook Management system for materials adopted for 2007-2008 or later to track obligations.
 - B. Assessing charges.-- As required by Fla. Stat. § 1006.28(3)(b), as interpreted consistent with the exemption under § 1003.62(2) approved by the State Board of Education on February 17, 2004, the obligations to be tracked for books reported as lost or destroyed

during the school year shall be based on the 100% value of any book during its first two years of service (but after the second year, books shall be charged at a percentage between 50% and 75% of the purchase price, depending on the physical condition of the book). Schools shall use the Textbook Dictionary Price List (TX0121) that is distributed to all schools posted on the Instructional Materials Department web page in August of each year for pricing information. Textbook Dictionary Price List can be viewed http://www.palmbeach.k12.fl.us/instructionalmaterialsdept/priceupdat e.htm and is incorporated herein by reference as part of this policy.

- iii. Parent notification.-- After each periodic book check and each grading period, a written notification of a textbook obligation an Instructional Materials Obligation Letter (PBSD 2057) or Destiny Overdue Materials and Unpaid Fines Notice is generated, and teachers must send these notices of lost/ destroyed book obligations to parents along with progress reports or report cards. A copy of the form is available on the District web page at: http://www.palmbeach.k12.fl.us/Records/PDF/2057.pdf, and is incorporated herein by reference as part of this policy. Documentation of all communication with students and parents, verbal and written, including telephone calls, parent conferences, certified letters, and letters from the Legal Services Department shall be kept on file.
- iv. "Reasonable efforts" defined.-- Reasonable collection efforts by the principal/designee may be defined to include sending the Textbook Lost/Damaged form (PBSD 0395) Instructional Materials Obligation Letter (PBSD 2057) to the parent/guardian via certified mail; placing a follow-up telephone call; following up with a documented student or parent conference, if possible; and then sending a second notice by certified mail if the sum has not yet been remitted.
- v. Determination of consequences for lack of payment.-- If reasonable efforts by the principal/designee to collect the obligation described in paragraph (4)(c)(iv) are unsuccessful, the principal shall impose consequences as follows:
 - A. Suspension from Extracurricular Activities.-- As stated in Fla. Stat. § 1006.28(3)(b), the student will be suspended from participation in extracurricular activities (if the student is involved in such activities) until such time as the parent/guardian has paid for such loss, destruction, or unnecessary damage as required by Fla. Stat. § 1006.28(3)(b); or alternatively, the student may elect to satisfy the obligation through community service hours pursuant to subparagraph B, below.

- B. Community Service Hours.-- If the student is not suspended from extracurricular activities to encourage the parent/guardian to satisfy the obligation (because the student is not involved in such activities or the student has elected to perform community service hours), the principal may require the student to satisfy the debt through age-appropriate community service activities at the school site, as stated in Fla. Stat. § 1006.28(3)(b).
 - I. Definition.-- For purposes of this Policy, community service activities must be supervised age-appropriate activities at the school site. Depending on the nature of the activity and the availability of supervision, some of these activities may occur after school hours or on a weekend; and they shall not be done during the student's classes. Some examples may include: shelving books in the media center; assisting in the cafeteria; picking up litter; assisting the teacher, coach, or custodian; cleaning blackboards; washing golf carts; working in the ticket booth at sports events; weeding flower beds; performing minor maintenance activities; setting up chairs for weekend events; assisting with textbook maintenance; or other activities helpful to the school or its students.
 - II. Calculating the Hours.-- The number of required hours and quarterly fractions thereof shall be calculated by dividing the debt by the prevailing hourly minimum wage as stated at http://www.dol.gov/esa/whd/flsa/), after the debt is calculated using the formula in subparagraph (4)(c)(ii)(B) above and Fla. Stat. § 1006.28(3)(b). For example, to satisfy a debt of \$50, the student would perform 9 hours and 45 minutes of community service at the school site. This is calculated by dividing the \$50 debt by \$5.15 (the prevailing minimum wage as stated at http://www.dol.gov/esa/whd/flsa/), and then rounding the quotient to the nearest quarter hour.
 - III. Documentation.-- The principal/designee shall keep a record of when the debt has been satisfied, using the Community Service Record for Instructional Materials Obligations (PBSD 1990). . A copy of the form is available on the District web page at: http://www.palmbeach.k12.fl.us/Records/PDF/1990.pdf, and is incorporated herein by reference as part of this policy. Of course, a student's community service hours will be cut short upon receipt of the parent's/guardian's payment for any amount not yet satisfied through the community service activities. For example, if a student owes \$50 and has done \$20 worth of community-services activities, the remaining \$30 could be

satisfied through payment of the remaining \$30, rather than through completion of the activities.

- vi. Refunds for found books.-- In the event a student finds a book that had previously been reported lost and paid for as an obligation, the school shall issue a refund. The amount of the refund shall correspond with the physical condition of the book. For example, a book that is returned in unnecessarily-damaged condition may not merit any refund. On the other hand, a book returned without any unnecessary damage might merit a full refund.
 - A. The school shall request its instructional materials contact to complete a Check Requisition (PBSD 0181) in order to refund the student for the obligation, regardless of whether it was satisfied through the parent's/guardian's direct payment or through the student's community services hours. A copy of the form is available on the District web page at:

 http://www.palmbeach.k12.fl.us/Records/Forms/0181.omf and is incorporated herein by reference as part of this policy.
 - B. If the book is found after the student has been suspended from extracurricular activities, the student may be reinstated to the extracurricular activities upon satisfying any obligation for unnecessary damage to the returned book.

d. End-of-Year Inventory

- i. Storage of Inventory.-- A physical count of all materials that were not issued to students or teachers and are stored in either central storage spaces or classrooms shall be conducted at year end and reported to the school's instructional materials contact. A written or electronic record of the school's quantities and locations of all stored materials must be available over the summer months. Principals should have access to this information in the event that some materials may need to be transferred during the summer months due to reasons such as loss of enrollment or opening of a new school in the area.
- ii. Collection of teaching materials.-- At the end-of-year checkout or when a teacher leaves mid-year, the teacher shall return teaching materials to the principal/designee, even if a teacher transfers to another school in the District, because the materials are assigned to the school where issued. If desired, the school that is losing the teacher unit may elect to have the teaching materials transferred to the receiving school. In such cases a Textbook Exchange form (PBSD 0390) shall be executed or the transfer of bar coded materials is accomplished through the Destiny Textbook

276 <u>Management System. The PBSD 0390 form can be viewed at:</u>
277 <u>www.palmbeach.k12.fl.us/instructionalmaterialsdept/manual.htm, and is</u>
278 <u>available to order from the Instructional Materials Department. The form</u>
279 <u>is incorporated herein by reference as part of this policy.</u>

- iii. Logging return of materials by students.-- At the end of the school year or term, students shall return materials issued to them for that year or term. Schools All materials returned from students and teachers that are checked books in and out using SIRSI Destiny shall be scanned in and all books returned from students and print a list of any books not returned shall be printed. In schools not using SIRSI, For materials not tracked via Destiny (adoptions prior to 2007-2008) teachers shall maintain a written verification that all materials are returned by students.
- iv. Report of lost/damaged student materials.-- Any missing material not previously reported as lost or destroyed shall be logged by the classroom teacher on the Textbook Lost/Damaged form (PBSD 0395). The classroom teacher must submit a copy of the Lost/Damaged Materials Notice (PBSD 0395) to the instructional materials contact and school bookkeeper. The PBSD 0395 form can be viewed at:

 www.palmbeach.k12.fl.us/instructionalmaterialsdept/manual.htm, and is available to order from the Instructional Materials Department. The form is incorporated herein by reference as part of this policy.
- v. Selling books to students.-- Schools may sell books to student or parents if they so choose. The school shall cross out any markings or remove bar codes identifying the book as School Board property. The money from the sale shall be added to the lost textbook account (6-5200.00) and remitted to Accounting Services with the lost/damaged collections at the end of the year. The sold book shall be reported as lost on the TX05 screen in June. and the Textbook Inventory Report.
- vi. School-wide inventory counts and reporting of final losses.-- A physical count of all student books and teacher materials returned at the year end and a count of books in storage shall result in the school's final inventory at year end. All documented lost books are reported on the TX05 screen and on the end of year Textbook Inventory Report.
- vii. Remittance of all monies collected for instructional materials.-- All monies in school textbook accounts (6-5200.00) shall be cleared out at year end and remitted to Accounting Services with a transmittal form (PBSD 0150) indicating payment for lost/damaged books. A copy of the form is available on the District web page at: http://www.palmbeach.k12.fl.us/Records/PDF/0150.pdf, and is incorporated herein by reference as part of this policy.

e. <u>Collection of End-of-Year Obligations</u>.-- Any student with textbook obligations at the end of the school year (unless previously satisfied through community service hours) will be placed on the obligation list; the parent/guardian shall be notified; and the principal/designee shall make reasonable collection efforts.

- i. Assessing charges for books lost, destroyed, or unnecessarily damaged.-As required by Fla. Stat. § 1006.28(3)(b), as interpreted consistent with the exemption under § 1003.62(2) approved by the State Board of Education on February 17, 2004, books that were in the first two years of use when lost, destroyed, or unnecessarily damaged, shall be charged at 100% of their new purchase price; but after the second year, books shall be charged a percentage between 50% and 75% of their price, depending on the physical condition of the book. Schools shall use the Textbook Dictionary Price List (TX0121) that was is distributed to schools posted on the Instructional Materials Department web page in August at the beginning of the school year for which the obligation is reported.
- ii. Notice to parent/guardian.-- Notice shall be given to the parent/guardian of any end-of-year textbook obligations, using the Textbook <u>Obligation Letter Lost/Damaged form (PBSD 0395)</u>. Documentation of all communication with students and parents, verbal and written, including telephone calls, parent conferences, certified letters and letters from the Legal Services Department shall be kept on file.
- iii. *Tracking obligation status.--* Schools shall use the TERMS Fees and Fines Program or SIRSI <u>Destiny</u> system to track obligations.
- iv. Referral to Legal.-- After reasonable attempts by the principal/designee to collect, the debt shall be referred to the Legal Services Department for further assistance using PBSD 2020 Textbook Collection Referral. A copy of the form is available on the District web page at: http://www.palmbeach.k12.fl.us/Records/PDF/2020.pdf, and is incorporated herein by reference as part of this policy. (Reasonable collection efforts by the principal/designee may be defined to include sending the Textbook Lost/Damaged form (PBSD 0395) Obligation Letter to the parent/guardian via certified mail; placing a follow-up telephone call; following up with a documented student or parent conference, if possible; and then sending a second notice by certified mail if the sum has not yet been remitted.)
- v. Other debt-collection methods.-- If the obligation has not been satisfied by the parent/guardian after reasonable efforts by the principal, or by community service hours, the School Board may exercise any lawful means of carrying out its statutory responsibility of collecting the obligation, including, but not limited to, referral to a debt-collection

agency.

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- vi. Student consequences.-- If an end-of-year obligation still has not been satisfied by the beginning of the next school year after reasonable collection efforts by the principal/designee, the principal should impose consequences as follows:
 - A. Suspension from Extracurricular Activities.—A student's instructional materials obligations shall be tracked from grade to grade and school to school until the debt is satisfied or the following consequences have been imposed. The student shall be suspended from participation in extracurricular activities (if the student is involved in such activities), until such time as the parent/guardian has paid for such loss, destruction, or unnecessary damage as required by Fla. Stat. § 1006.28(3)(b); or alternatively, the student may elect to satisfy the obligation through community service hours pursuant to subparagraph B, below.
 - Community Service Hours. If the student is not suspended from extracurricular activities (because the student is not involved in such activities or the student has elected to perform community service hours), the principal will require the student to satisfy the debt through age-appropriate community service activities at the school site as explained in subparagraph (4)(c)(v)(B), above. The principal/designee shall keep a record of when the debt has been satisfied, using the Community Service Record for Instructional Materials Obligations (PBSD 1990). A copy of the form is available District the web page http://www.palmbeach.k12.fl.us/Records/PDF/1990.pdf. and incorporated herein by reference as part of this policy. However, a student's community service hours will be cut short upon receipt of the parent's/guardian's payment for any amount not yet satisfied through the community service activities. For example, if a student owes \$50 and has done \$20 worth of community-services activities, the remaining \$30 could be satisfied through payment of the remaining \$30, rather than through completion of the activities.
- vii. Refunds for found books.-- In the event a student finds a book that had previously been reported lost and paid for as an obligation, the school shall issue a refund. The amount of the refund shall correspond with the physical condition of the book. For example, a book that is returned in unnecessarily-damaged condition may not merit any refund. On the other hand, a book returned without any unnecessary damage might merit a full refund.

396 397 398 399 400	A.	The school shall request the instructional materials contact to complete a Check Requisition (PBSD 0181) in order to refund the student for the obligation, regardless of whether it was satisfied through the parent's/guardian's direct payment or through the student's community service hours.	
401 402 403 404	B.	If the book is found after the student has been suspended from extracurricular activities, the student may be reinstated to the extracurricular activities upon satisfying any obligation for unnecessary damage to the returned book.	
405 406 407	STATUTORY AUTHORITY: Fla. Stat. §§ 1001.41(2); 1006.28 LAWS IMPLEMENTED: Fla. Stat. §§ 1003.62(2); 1006.28; 1006.42 HISTORY: 1/13/03; 8/2/2004;/2008		

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The Legal Departme sufficient for develop		osed Policy 8.1225 and finds it legally
sumcient for develop	ment by the Board.	
Attorney	Date	