
INSTRUCTIONAL MATERIALS
MANAGEMENT PROCEDURES
FOR SCHOOLS

Compiled and Written by:
The State Textbook Office
South Carolina Department of Education
April 2008

AUTHORITY

State Board Regulation R43-71 (excerpt):

Free Textbooks

Section 1. Free Basal Textbook Enabling Act. Pursuant to Section 59-31-360 to provide "free basal textbooks" in Grades K–12, S. C. State Board of Education does hereby set forth procedures for ordering instructional materials.

Section 2. Requisition for Free Instructional Materials. Requisitions for free instructional materials shall be made only to the State Department of Education, in accordance with "Instructional Materials Management Procedures for Schools."

Guidelines for Inventory Control Management

1. Establish School Board of Education approved textbook management policies to include individual, school, and district accountability and monetary responsibility for all state and district owned textbooks and instructional materials. Responsibility should extend to everyone involved with textbooks: students, parents, teachers, and administrators. Board policy should include a statement as to the expected life of a textbook.
2. Publish an annual textbook price list to include Board approved fees for lost or damaged textbooks.
3. Designate a school textbook coordinator to manage the campus inventory.
4. Designate a district textbook coordinator to manage the district textbook program.
5. Provide a central and secure textbook storage area at each campus.
6. Establish a baseline at each campus by conducting a thorough physical inventory. Require campuses to maintain complete records of all receipts and losses as they impact the baseline inventory.
7. Require campuses to maintain complete records of distributions to teachers and students and returns from teachers and students with monies collected for losses.
8. Require standard procedures for transfers between teachers and campuses.
9. Require campuses to take action immediately in the event of a shipping error or loss.
10. Conduct a thorough annual physical inventory of all textbooks and other instructional materials.
11. Provide for an annual assessment of the success of the district textbook program. Report losses to the Board for review and approval.

TABLE OF CONTENTS

	<u>Page</u>
Introduction	1
General Information	1
R. L. Bryan Company	1
State Textbook Office.....	1
Inventory	
School-Owned Instructional and Supplementary Materials	2
Out-of-Adoption Titles	2
State-Owned Materials (Current Adoptions)	2
Inventory (State) Requirements	2
Lost Materials – Charges	3
Lost and Damaged Fees – Due Date.....	3
Files and Reports	4
Surplus Books, Definition	4
Surplus, Return	4
Surplus, When to Return.....	4
Surplus, Return Request.....	4
Kit, Definition	4
Kits, Returning.....	4
Casualty Loss.....	4
Individual Casualty Loss (Minor)	4
School Casualty Loss (Major)	5
Bookroom.....	5
School Textbook Account Audits	5
Inventory Management System.....	5
District/School Policies & Procedures	5
Orders	
Ancillary Materials	6
Supplementary Materials	6
State-Funded Materials.....	6
Internet On-line Ordering System	6
User ID and Password	6
Eligibility/Allocations	6
Allocation Increases	6
Ordering, Fax and Mail.....	6
New Adoptions	7
Teacher Editions–Special Order Form.....	7
Shipments	7
Shipping Charges.....	8
Stamping/Numbering New Materials.....	8
Returns, Exchanges, and Transfers	
Reasons for Returns	9
Return of Instructional Materials	9

	<u>Page</u>
Defective Materials.....	10
Rebinding Worn Materials.....	11
Credit for Returned Materials	11
Partial Exchanges	11
Transfer of Materials between Schools (Transfer Form).....	12
Transfer of Materials between Schools (On-line Transfer)	12
 Other Procedures	
Special Audits	14
School Board of Trustees Request	14
District-Requested Materials	14
Purchase of Materials Adopted/Not Funded	14
 Telephone and Fax Numbers	16
 Appendix A – Forms	18
Appendix B – State Board Regulation R43-71	19

INTRODUCTION

Instructional Materials cost the State of South Carolina in excess of \$60 million annually. It is important, therefore, to be a good steward of this important asset for education by properly accounting for and obtaining maximum usage of the materials currently in your school. This document, *Instructional Materials Management Procedures for Schools*, is provided as a guide for principals and textbook coordinators in the management of their schools' state-owned instructional materials account. This pamphlet provides most of the information needed when new managers take over a bookroom for the first time.

GENERAL INFORMATION

The State Textbook Office is responsible for the purchase, allocation, distribution, and accounting of state-owned instructional materials throughout the public schools of South Carolina. The R. L. Bryan Company, as an agent of the publishing companies, operates the Central Textbook Depository under contract with the State Department of Education. All materials adopted by the State Board of Education are available through the depository.

The addresses and phone numbers for the State Textbook Office and Central Depository are listed below:

State Textbook Office

301 Greystone Boulevard, Suite 150
Columbia, South Carolina 29210
803-253-4178, 888-202-3953
Fax: 803-253-6130 or 888-206-8330

Central Textbook Depository

301 Greystone Boulevard
Columbia, South Carolina 29210
803-343-6740, 800-476-1844
Fax: 803-343-6741

The State Textbook Office provides title listings, order forms, return forms, and other forms to each school. Forms for ordering supplementary materials (for purchase only) are provided by the Central Depository. All State Textbook Office forms may be reproduced.

INVENTORY

A school's instructional materials inventory consists of three types of material: school-owned materials, currently adopted state-owned materials, and out-of-adoption titles. Each school should have a **locked** storage area for all state-owned materials. The area should be dry and free of insects. Any damage due to improper storage or lack of maintenance of the storage area is not covered by insurance and is the responsibility of the school.

School-Owned Ancillary and Supplementary Materials: These are free materials provided by publishers with a new adoption and supplementary items purchased by the school and are not accountable to the State Department of Education. They should be kept separate (in a designated area) from state-owned materials when stored in the bookroom and clearly marked as property of the school district.

State-Owned Materials (Current Adoptions): These are titles that appear on the inventory not prefixed by an asterisk. If you are a new principal (or textbook manager), you should immediately verify your school's inventory. Report all discrepancies to your district office and to the State Textbook Office. You will be responsible for **all** shortages at the end of the school year. Make sure you are not held accountable for the previous manager's unreported losses from previous years. Discrepancies in inventory can amount to thousands of dollars.

Out-of-Adoption Titles: These are titles that appear on the inventory prefixed by an asterisk that are no longer being provided by the State. After accounting for these materials on the final inventory of the last year of the adoption, all new materials not labeled, marked, or stamped must be returned to the depository. All others may be used as classroom sets or as supplementary material. They may be given to students, schools, or non-profit organizations such as churches, etc. Out-of-adoption materials may also be sold for recycle or resale. The school is not financially responsible for out-of-adoption items.

Inventory (State) Requirements: State law requires each school to count all state-owned materials each year and report the totals to the State Textbook Office. After school closes for the year, all materials from students, teachers, and lockers should be counted and entered into the on-line system. Instructions for performing the physical inventory are as follows:

1. Log on to www.mysctextbooks.com and click on *Inventory*. Then click on *Record Physical Counts* and complete the inventory form.
2. Count all materials except the out-of-adoption materials marked with an asterisk before the title. Materials received after the close of the inventory cycle should not be included in the counts. Count only new consumable materials. Consumable

materials that are used, lost, or damaged are not charged to the school lost textbook account.

3. Enter the count in the space provided on the inventory form by changing the default "0" count.
4. Periodically click on the *Preliminary Calc* button at the bottom of the inventory form to save your count and to update the total of lost textbook fees owed by your school.
5. When you submit the completed inventory, it will be reviewed, adjusted if necessary, and approved. You will be notified when the inventory review is complete.
6. When notified, print the on-line invoice for your school and send a check for the amount due, if any.
7. If a district pays the invoice, please provide the school name and amount on the check stub.
8. Please mail checks to the following address:

Inventory Manager
South Carolina Department of Education
State Textbook Office
301 Greystone Boulevard, Suite 150
Columbia, South Carolina 29210

Charges for Lost Materials: The state does not charge the full contract price for lost materials. The amount of the charge varies with the contract year of the material. Schools may charge students for lost or damaged materials. The amount of the charge is a local school or district decision. Any funds collected shall be remitted to the State Department of Education.

The state assesses schools the following charges for lost and damaged books or materials:

- | | |
|--|-----------------------|
| • New in the current school year | 80% of Contract Price |
| • One year before the current school year | 65% of Contract Price |
| • Two years before the current school year | 50% of Contract Price |
| • Three years before the current school year | 35% of Contract Price |
| • Four years before the current school year | 25% of Contract Price |

Lost and Damaged Textbook Fees Are Due: Pursuant to Proviso in the Appropriations Acts and State Board of Education Regulations, fees for lost and damaged textbooks for the prior year are due December 1st of the current year when

billed by the State Textbook Office. School state owned textbook accounts may be disabled for failure to pay when billed.

Files and Reports: Schools are required to maintain separate files for instructional materials records, correspondence, and forms. These files should include records of materials issued and returned from students/teachers, lost/damaged materials, lost and damaged fees receipts, R43-71 Section 19 & 20 fee waivers, disbursements for K-8 science kit refurbishment expenses, and disbursements from sales of out-of-adoption materials.

Definition of Surplus Books: Surplus materials are materials in the possession of a school that are not being used during the current school year.

Return Surplus: Surplus materials should be returned to the Central Depository. Proper credit will be issued to the school returning such materials. The return of surplus materials is subject to approval by the State Department of Education.

When to Return Books: After the opening of school each year, surplus materials should be returned as soon as the school can determine that a surplus is on hand due to changes in course offerings and/or enrollment.

Return Surplus Request: Schools returning materials should submit an on-line return request found through the on-line ordering system. The instructions for packing, labeling, method of shipment, etc. can be found on page 9 of this manual as well as online. Schools using the State Destiny Textbook Manager must submit a transfer to the State Textbook Office when returning textbooks.

Definition Kit: A kit is an instructional material consisting of one or more items. Kits include instructional materials, manipulatives, supplies, and instructions for hands-on experiments.

Returning Kits: Only new unopened and undamaged kits may be returned for credit. Non-consumable materials contained in a kit may be returned for credit provided the item is listed in the *Comprehensive Master Title Listing*. The State Department of Education will issue proper credit to the school returning such materials subject to approval.

Casualty Loss: Materials destroyed or damaged beyond further use by fire, flood, etc. in school buildings or private homes will not be charged to the individual or school provided an official of the school furnishes the State Department of Education a certified list of the materials destroyed, the place and date of the loss, and a description of the loss. In case of fire, please furnish a copy of the Fire Marshall's report of damages for losses in excess of \$250.

Individual Casualty Loss (Minor): Individual casualty losses are those losses occurring while the materials are in the possession of the student, in the home or motor

vehicle. Schools reporting these losses shall be issued proper inventory credit but no adjustment to their allocation.

School Casualty Loss (Major): School casualty losses are those losses occurring in the bookroom or classroom. Schools reporting these losses shall be issued proper inventory credit and an allocation adjustment less the \$250 deductible.

Bookroom: Schools are required to maintain a separate locked storage area (bookroom) for state owned instructional materials that is safe, clean, dry, and free of insects. Materials should not be stored on the floor.

State Owned Textbook Account Audits: The State Textbook Office School will establish an audit program of school state owned textbook accounts pursuant to the 2006-07 Appropriations Act. Audits of individual schools will be scheduled with the district textbook coordinator's assistance. Except for special audits, schools will be given advance notice of the audit date. Audit requirements are as follows:

1. All state owned non-consumable instructional materials must be made available in a central location (bookroom) or locations (classrooms) for inspection and counting.
2. Class/course rosters must be printed for the auditor. (Official class/course rosters may be used to help verify inventory counts when school is in session at the auditor's discretion.)
3. Files for instructional materials records, correspondence, and forms must be available for inspection. These files should include records of materials issued and returned from students and/or teachers, lost/damaged materials, lost and damaged fees collected, R43-71 Section 19 & 20 fee waivers, and sales of out-of-adoption materials.
4. Receipts and disbursements for lost and damaged textbook fees must be available for inspection.
5. Disbursements for K-8 science kit refurbishment expenses must be available for inspection.
6. The textbook storage area (bookroom) must be open for inspection.
7. The auditor should be provided a copy of the district's instructional materials management policies and procedures.

Inventory Management System: Schools/districts are required to participate in the statewide implementation of the inventory management system for state-owned instructional materials. The General Assembly authorized the system in the 2006-07 Appropriations Act and State Board of Education Regulations require schools to bar-code state owned textbooks and circulate them using the State Destiny Textbook Manager.

District/School Policies & Procedures: Districts and schools should establish policies and procedures for the effective management of state owned textbooks. See the *Guidelines for Inventory Control Management* on the inside front cover.

ORDERS

Orders for instructional materials fall into three categories: teacher's editions, supplementary, and state-owned.

Ancillary Materials: Ancillary materials and services are provided by publishers free or at a reduced rate with the purchase of an adopted program. These materials include teacher's editions, workbooks, diskettes, software, videos, in-service, consultants, etc. A listing of ancillary materials with the publishers' names and addresses is published on the Web at www.mysctextbooks.com by the State Textbook Office annually.

Supplementary Materials: Supplementary materials are available from the R. L. Bryan Company. These are purchase only materials paid for from local funds.

State-Funded Instructional Materials: State-funded instructional materials listed in the *Comprehensive Master Title Listing* are available from the State Department of Education. Materials may be ordered by using the Internet on-line ordering system or by completing an order form (see Appendix A) and mailing it to the address shown or by faxing to 803-343-6741.

Internet On-line Ordering System: The on-line ordering system is accessible on the Internet at www.mysctextbooks.com. Log on with the buyer password and click on *Orders* then *Order from Catalog* or *Order Entry*.

User ID and Password: The Department provides a listing of schools' user IDs and passwords to district superintendents or their designees. Please contact your district office should you need school login information. If you need to change your password for security reasons, please fax a request signed by the principal to the State Textbook Office.

Eligibility/Allocations: A school's eligibility to order instructional materials under the state free textbook program is determined by the school/district curriculum, class or course enrollment, and the principle—one textbook per child—in a subject area except in subject areas where it is customary or appropriate to use classroom sets. Schools may not order textbooks for courses that are not being offered by the school in the current school year or in excess of enrollment. The Department will provide sufficient allocations for schools to order textbooks for which they are entitled.

Allocation Increases: Please contact your district textbook coordinator.

Fax and Mail Orders: Fax and mail orders require completion of the information requested on the front of the order form (see Appendix A). **Make sure a contact person is listed in case clarification of an order is needed.** The principal or school textbook coordinator must sign the requisition.

Your school's available allocation should be compared to your total order amount before submitting a fax or mail order. **Your order will be rejected if the total amount exceeds your school's available allocation.** This information by school is accessible on the Internet on-line ordering system or you may call the State Textbook Office or the Central Depository.

New Adoptions: Orders for new adoptions may be placed beginning June 1 unless otherwise notified by the State Textbook Office. New adoptions are to be given careful consideration by both the district and the school. **Once a new adoption is selected and put into use by a school, it cannot be exchanged for at least six years.**

Each district and school will be notified which new subject areas will be funded for the upcoming school year. **All other subject area titles are to be retained by the school.** Orders for new titles that are not funded will not be processed.

Funds for the replacement of materials in any given subject area are provided by the legislature every six years. Replacement of subject areas that have been on hand in a school for less than the six-year cycle are not funded. In some instances, used materials may be available to fulfill a need for exchange. The Request for Partial Exchange form may be found in Appendix A.

Teacher Editions–Special Order Form: Additional teacher editions may be ordered for special education classes and when the school cannot meet publishers' student/teacher ratio for free teacher editions due to reduced class size. Additional orders including existing inventory should not exceed one teacher edition per teacher in a subject area. The cost of these materials will not be deducted from school allocations. Use the Special Order Form, IMS-006 (see Appendix A) to order additional teacher editions.

Shipments: The shipment of materials to schools by the Central Depository will begin June 1. Most materials are shipped during the summer and will be shipped directly to the school unless otherwise specified. **Each shipment must be verified and signed for by a person in the school.** This signature represents a transfer of responsibility from the freight line to the school. Make sure that the number of boxes appearing on the bill of lading is equal to the boxes in the shipment. **The school is responsible for shortages if a "clear bill" is produced by the trucking company.** Make a note of any "cartons short" under your signature on the bill of lading. **No adjustment will be made for box count discrepancies reported after delivery.** Also, note if any cartons are wet or damaged. You have the right to refuse any shipment that is damaged.

After the order is delivered, open all cartons and check all materials immediately against the "picking ticket" included in a plastic envelope on one of the cartons. An official shipment advisory will be sent within a week. Compare the "picking ticket" with the shipment advisory. Carefully, compare items ordered to items received. Check the "picking ticket" for backorder indication. These materials are on back order from the publisher and will be sent as soon as available. **No adjustment will be made for**

individual item discrepancies reported more than thirty days after delivery. Mark the shipment advisory identifying shipping discrepancies. Immediately call the Central Depository at 800-476-1844 and inform them of the discrepancy. Additionally, mail or fax a copy of the annotated shipment advisory to both the Central Depository and to the State Textbook Office.

The State, shipping contract specifies indoor delivery and pick-up. Drivers are required to hand truck individual boxes to schools' textbook storage area. Drivers are not permitted to hand truck boxes up or down stairs due to OSHA safety regulations.

Shipping Charges: The State pays shipping charges, but under some circumstances schools may be responsible. If there is no one to accept delivery of a shipment during normal business hours, schools may be assessed a re-delivery charge. To avoid these charges, please change the "Ship After Date" field on the online order form to delay shipment of an order to a date when someone will be available to accept the shipment. Schools may also be assessed shipping charges due to ordering errors.

Stamping/Numbering New Materials: New materials are on consignment from the publisher and are not purchased by the State until **bar-coded** and issued to a student. Any new, unmarked materials left over must be returned to the Central Depository to obtain a refund from the publisher. **Do not stamp, bar-code, label or otherwise mark new instructional materials until issued to a student.**

RETURNS, EXCHANGES, AND TRANSFERS

Reasons for Returns: A return of materials to the Central Depository can become necessary for several reasons:

- Your school has excess **new/unused** materials that are unstamped and unmarked. (Return ALL unstamped and unmarked materials. **The Central Depository turns in new/unused materials** to the publisher for a refund.)
- Your school has excess **used** inventory in any subject area.
- Your school has **new/unused** materials going out of adoption.
- Your school received a shipment of defective materials. Contact the Central Depository at 800-476-1844.
- Your school has been requested by the State Textbook Office to return state owned materials.

Return of Instructional Materials:

1. Pack the materials in cartons, but do not seal them. Seventy pounds is the maximum allowable weight per carton. Number the cartons sequentially.
2. Log on to the on-line ordering system, www.mysctextbooks.com, and click *Returns*. Next click *Create Return Request* and complete the on-line return form and submit it. Please make sure that the entered carton count is accurate. If you do not have access to Internet, please complete the current version of the Return Form IMS 04 dated (02-10-99). Fax or mail the return form to the State Textbook Office.
3. The on-line Return Summary page will list the return as submitted to the State Textbook Office. The State Textbook Office will review the form and determine that the return is not a partial exchange (see note).
4. If the above criterion is met, the State Textbook Office will approve the return and the on-line Return Summary page will list the return as approved by the State Textbook Office.
5. Click on the approved return to view the Return Detail page. Print the Return Detail page. The Return Detail page shows the Return Materials Authorization (RMA) number.
6. Enclose the Return Detail page in carton number one and seal the cartons after removing any materials not listed on the approved return.
7. Estes Transportation Company or United Parcel Service (UPS) will be notified by the State Textbook Office to pick up the materials from the school. Schools are not

required to pay freight for routine returns. Please make sure the "collect" box on the motor freight shipping form is checked.

8. The State Textbook Office will fax return instructions and labels for Estes shipments to be placed onto each box. These labels should be **cut out and securely taped onto the top of each box**. UPS provides return labels at pick up.
9. Materials returned to the Depository not authorized by the State Textbook Office will be returned to the school, and the school/district will be billed for the freight charges.
10. Notify the State Textbook Office if your return is not picked up within ten business days.
11. Schools using the State Destiny Textbook Manager must submit a transfer to the State Textbook Office when returning textbooks.

NOTE: A return exceeding 25 percent of a title or series may be treated as an exchange and not approved.

Defective Materials: Under the terms of state contracts for state-adopted textbooks, publishing companies agree to replace without cost to the state any textbooks that during the first two years of normal use show evidence of faulty binding or manufacturing. As you prepare to inventory textbooks for closing school at the end of the year, please check the books for signs of manufacturing failures. Some examples of things to look for are:

- **Condition of joints**
Look for partial or complete separation of joints or hinges, along the spine of the book . . . front, back, or both.
- **Integrity of the book block**
Look for single or multi split separating of book block from the case or cover. This would be noted inside the front or back cover, most likely along the first signature.
- **Holding of individual pages**
Are pages falling out or missing or is there partial separation of individual pages?

If a series shows problems such as missing or loose pages, spines becoming separated from the covers, or any other abnormality, contact the Central Depository with the **exact** quantity and title of the defective materials. Materials that are not usable due to abuse or normal wear will not be considered for warranty replacement. Also, please fax a list of the defective titles and a brief description of the defect on your school's letterhead to the State Textbook Office (888-206-8330).

Rebinding Worn Materials: The state has a contract with a bindery for rebinding materials; however, schools cannot send in materials “to be rebound.” Replacements for worn materials will have to be ordered through the normal procedure by the school. Rebound materials may or may not be sent depending on used stock available at the time of the order.

Credit for Returned Materials: Schools receiving full credit for contract prices of new materials will have their school inventory reduced and their available allocation increased. Schools receiving credit for used materials in good or repairable condition will have their school inventory reduced and their available allocation increased based on the depreciation schedule on Page 3. Credit is not given for damaged materials or materials no longer in adoption unless they are **new/unused**. **Note:** Allocation credit for returned materials may be limited or not given if warranted by funding constraints.

The Central Depository determines the condition of returned materials based on utility or suitability for repair, rebinding, or reissue as used. Factors considered are missing, torn or fluffed pages, excessive writing or profanity, and stains. All returned materials are counted, logged, and checked carefully before classification.

Schools receive a credit memorandum from the Central Depository detailing their returned materials transaction. Additional information is available through the on-line system by clicking *Returns* and *Returns Detail*.

Partial Exchanges: State Board of Education regulations state, “Schools shall not return materials presently on the state-adopted list to be exchanged for other titles or series, except limited changes that are justified by variations in student achievements. Any books/materials exchanged must be on different levels of difficulty. Provided, that the Board shall have the authority to limit or postpone the acquisition of titles or series for such period of time as may be deemed advisable.”

You may request an exchange of a title or series in a subject area provided the cumulative total exchanged does not exceed 25 percent of your inventory of the title or series (or less if deemed advisable). **Requests for partial exchanges may not be approved when warranted by funding constraints.** The following procedures apply to partial exchanges:

1. Send the State Textbook Office a Request for Partial Exchange form (see Appendix A).
2. Prior to authorizing the return, the following factors are considered:
 - a. Total number of items being returned
 - b. Current used material inventory at the warehouse
 - c. Cost of exchange
3. The return for exchange is approved or denied based on several criteria:

- a. Information from Section 2, above
 - b. School's justification for requested exchange
 - c. Availability of funds and/or used materials.
4. You will be notified of the decision by mail or fax.

Transfer of Materials Between Schools (Transfer Form): Materials should not be loaned to other schools, but should be permanently transferred from one school to another by completing the Textbook Transfer form (see Appendix A). The Department of Education encourages the transfer of excess instructional materials inventory between schools. School staff should search the on-line detail inventory to locate excess instructional materials before ordering from the Central Depository. Currently schools using the State Destiny Textbook Manager must transfer textbooks in both Destiny and on www.mysctextbooks.com.

Transfers require authorization from both the receiving and sending schools. If the paper transfer form is used, each school should retain a copy and the original should be sent to the State Textbook Office for inventory adjustment.

1. Schools should reach agreement prior to submitting transfer forms to the State Textbook Office.
2. Sending school sends completed transfer form to receiving school with the shipment of materials.
3. Receiving school submits completed transfer form to the State Textbook Office after verifying receipt of shipment of materials.
4. The State Textbook Office reviews transfer forms for necessary signatures, school and materials coding information, cost data, and discount calculations.
5. The State Textbook Office processes the transfer making the appropriate adjustments to the schools' inventories and available allocations.

Transfer of Materials Between Schools (On-line Transfer): Materials may be permanently transferred from one school to another by processing an on-line transfer. Log on to www.mysctextbooks.com, click on *Inventory* then *Transfer*.

1. Requesting school locates schools with titles needed using the "Show Schools That Have This Title" function in *Browse Catalog*. Requesting school submits an on-line request to the sending school specifying the title number(s) and quantity of books to be transferred after written or verbal confirmation that the sending school will transfer the titles.
2. At the *Welcome* page click on *Inventory*, *Transfer Requests*, and *Create Transfer Request* to initiate a transfer of materials.

3. Enter requesting school contact information and click the *OK* button. Select sending school from list, enter sending school contact information, and click the *OK* button. Enter title numbers and quantities of items to be transferred and click the *Add to Request* button. Click on *Submit Request* at the top of the form after checking transfer request for accuracy.
4. Sending school accepts or rejects the on-line request. Requesting school may also cancel the request before the sending school has acted on it.
5. Sending school physically transfers materials to requesting school.
6. The requesting school enters online the quantity of each title received after verifying the shipment (Note: shipments may be complete, partial, or incorrect). To enter quantities received click the *Enter Qty Received* button, update the default "0" quantity, and click the *Save Changes* button.
7. The system considers this action an acknowledgement that the transfer is complete and generates an alert to the sending school. At this time, the physical inventory counts will be modified for requesting and sending schools.
8. Schools using the State Destiny Textbook Manager must submit a transfer to the State Textbook Office when returning textbooks.

OTHER PROCEDURES

Special Audits: Pursuant to R43-71 Section 12, the State Textbook Office may conduct audits of school state owned textbook accounts at any time deemed necessary. The audit team may require the school to bring the textbooks to a central location. The auditors' count will be final, and no adjustments will be accepted after the completion of the audit. The State Textbook Office recommends and may request a district staff member to attend and verify audit results. The State Textbook Office will send the district an invoice for all materials missing at the time of the audit. Payment is due in thirty days from the date of the invoice.

School Board of Trustees Request: The 1976 code was amended by adding Section 59-31-45 to allow the boards of trustees of five or more school districts or by the boards of trustees of two or more school districts with a combined population of twenty-five thousand or more students to request, in writing, any textbook or series of textbooks that have been reviewed and not adopted by the State Board to be added to the state-adopted list.

District-Requested Materials: When needed for instruction, a school district may request the review of materials for adoption. A letter from the superintendent or associate superintendent for instruction is required to initiate action for district-requested materials. The materials cannot have been submitted previously through the adoption process and the publisher has to be willing to meet the requirements.

Purchase of Materials Adopted/Not Funded: Pursuant Section 59-31-70, school districts may purchase instructional materials on the *Comprehensive Master Title Listing*, but not funded by Department of Education, when the materials are needed for instruction. The materials must be purchased from the Central Depository/publisher under contract with the State Board. Should funds become available for these materials at a later date, the district is entitled to a reimbursement. The amount of the reimbursement shall not exceed the lesser of the amount of the invoice or the calculated cost based on the per item price as stated in the *Master Title Listing*.

1. Schools should submit a copy of the paid invoice to the State Textbook Office within ninety days of the purchase with a statement signed by the superintendent or designee that the number of materials purchased does not exceed the enrolled student population for those courses for which the materials were purchased.
2. Requests for reimbursement relative to Section 59-31-70 are verified and recorded by the State Textbook Office.
3. Outstanding claims for reimbursement (invoices) are reviewed annually prior to allocating appropriations for instructional materials.
4. Claims are paid when adopted materials are funded for which an outstanding claim for reimbursement exists.

TELEPHONE AND FAX NUMBERS

State Textbook Office

301 Greystone Blvd. Suite 150, Columbia, South Carolina 29210

Returns, Transfers, Exchanges, Inventory, and General Information Inquiries:

Brewston Snelgrove
803-253-4134
bsnelgro@ed.sc.gov

Barbara Green
803-253-4178
bgreen@ed.sc.gov

Toll Free Telephone Number
Fax Number
Toll Free Fax Number

888-202-3953
803-253-6130
888-206-8330

Contract Information and Adoption Inquiries:

Vauline Johnson
803-253-6172
vjohnson@ed.sc.gov

Kriss Stewart
803-734-8393
kstewart@ed.sc.gov

Textbook Management System:

Keely Livingston
803-254-4881
klivings@ed.sc.gov

Jim White
803-253-4188
jwhite@ed.sc.gov

Instructional Materials Auditors:

Melanie Cooper
803-254-4878
mcooper@ed.sc.gov

Amy Reese
803-254-4880
areese@ed.sc.gov

Zackery Scriven
803-254-4879
zscriven@ed.sc.gov

Joni Culler
803-253-4150
jculler@ed.sc.gov

Regulations, Audits, Textbook Management System, Allocations:

Dr. Jim White
803-253-4188
jwhite@ed.sc.gov

TELEPHONE AND FAX NUMBERS
SC Central Textbook Depository
301 Greystone Blvd., Columbia, South Carolina 29210

Requisition Inquiries, Status of Orders, and Shipping Corrections:

Howie Beasley
803-343-6745
hbeasley@rlbryan.com

Bobby Phillips
803-343-6752
bphillips@rlbryan.com

Toll Free Telephone Number
Fax Number

800-476-1844
803-343-6741

This manual was written as an aid for the textbook manager in the school. Any comments, questions, or suggestions are welcome and should be addressed to:

Jim White, Ph.D.
SC Department of Education
State Textbook Office
301 Greystone Boulevard, Suite 150
Columbia, South Carolina 29210
803-253-4188, jwhite@ed.sc.gov

APPENDIX A – FORMS

[\(Click here for forms.\)](#)

APPENDIX B – R43-71

Document No.
STATE BOARD OF EDUCATION
CHAPTER 43

Statutory Authority: S. C. Code Ann. Sections 59-5-60 (2004), 59-31-210 (2004); 59-31-360 (2004)

R43-71. Free Textbooks

Section 1. Free Basal Textbook Enabling Act. Pursuant to Section 59-31-360 to provide "free basal textbooks" in Grades 1 through 12, S. C. State Board of Education does hereby set forth procedures for ordering instructional materials.

Section 2. Requisition for Free Instructional Materials. Requisitions for free instructional materials shall be made only to the South Carolina Department of Education (SCDE), in accordance with "Instructional Materials Management Procedures for Schools", by completing the official current order form or on internet using the ordering system on the South Carolina Instructional Materials Central Depository website.

Section 3. Provisions for Requisitioning and Distributing Free Instructional Materials.

- A. Acquisition of Free Instructional Materials on Levels of Achievement. Any pupil who is a member of any grade within the free instructional materials program may be assigned free instructional materials on the appropriate achievement level as indicated by tests and other evaluations.
- B. Allocation of Instructional Materials to Schools. The SCDE shall provide a schedule of instructional materials allocation formulas to the State Board of Education for information annually. The formulas shall be based on available funding provided by the General Assembly for the Instructional Materials program; the average cost of adopted instructional materials; and the prescribed percentage of total membership used in calculating materials allocations.
- C. Educable Mentally Handicapped (Special Education) Reading Primary classes shall be eligible for necessary reading materials not to exceed two pre-readiness readers and/or readiness programs and one beginning reading program.

Section 4. Changing to New Titles or Series. A school may change to a new title or series in a subject area only when new material on the same level is adopted by the State Board of Education. Schools shall not return materials presently on the state adopted list to be exchanged for other titles or series, except limited changes that are justified by variations in student achievements. Any books materials exchanged must be on different levels of difficulty. Provided, that the Board shall have the authority to limit or postpone the acquisition of titles or series for such period of time as may be deemed advisable.

Section 5. Property of the State. Title to all materials issued to schools and depositories under the Free Textbook Act shall be vested in the State. (Legislative Provision).

Section 6. Responsible Parties. The district board of trustees shall be responsible for the proper custody of all materials in its schools and depositories and shall be responsible for the administration of the Instructional Materials Management Procedures for Schools in those schools and depositories.

Section 7. Distribution to Schools. The county or district board of trustees shall elect from the procedures listed below the system of distribution to be used.

- A. County Depository: A county depository may be established through which all materials in the county will be distributed.
- B. District Depository: A district depository may be established through which all materials in the district will be distributed.
- C. School Depository: A school depository may be established through which all materials in the school will be distributed.

The board of trustees may designate an agent to operate the depository, maintain adequate records and make necessary reports and remittances to the responsible office at the SCDE; however, such designation does not relieve the board of its responsibilities.

Section 8. Shipping of Instructional Materials. Each school or depository will be sent a Shipment Advisory listing the materials shipped to it. The school or depository agent shall verify the materials received with the materials listed on the Shipment Advisory. If the title(s) and number of materials received do not agree with the title(s) and number of materials on the Shipment Advisory, a report must be made promptly to the responsible office at the SCDE showing: (1) the name of the school and county, (2) the number and date of the Shipment Advisory, (3) a complete itemized list of the differences between Shipment Advisory and books received, both over and short.

Section 9. Records and Reports. Each school and depository shall maintain a separate and complete file for instructional material records, correspondence, and forms. Each school and depository shall maintain an accurate record of the number of materials on hand, materials received and materials returned. They, also, shall keep an accurate record of sales, lost materials, and damage fees and report same to the SCDE and remit all funds collected and pay promptly all amounts due. The Department will issue an official receipt covering each remittance.

Each school and depository shall furnish the responsible office at the SCDE with membership reports, anticipated membership reports, inventory reports, and other reports as may be requested. Each school shall maintain a record of materials issued to each pupil.

Section 10. Storage. Each school and depository shall provide for instructional materials adequate places of storage which are safe, clean, dry, well arranged, and free of insects. Care must be taken to see that materials do not mold while in storage. Materials should not be stored on floors and should be at least one inch from walls to allow proper ventilation and protection from termites.

Section 11. Distribution Within the School. Materials may be distributed directly to the pupils from the central bookroom or delivered from the bookroom to each teacher to be issued to the pupils. Materials as determined by the responsible office at the SCDE shall be distributed and circulated using the online state textbook manager.

Section 12. Inspection. All materials and materials records shall be subject at any time to inspection by authorized agents of the county and/or district board of trustees and the SCDE. It shall be the duty of each teacher to inspect frequently the materials issued to pupils and to emphasize the proper care and handling of materials.

Section 13. Stamping or Labeling Instructional Materials. Free Instructional materials issued to pupils shall have a barcode label properly affixed marked "Property State of SC". New materials shall not be stamped or labeled or have a barcode affixed or otherwise marked until issued to pupils.

Section 14. Issuing Used Instructional Materials. All used materials of each title shall be issued before any new materials of the same title are issued.

Section 15. Marking in Instructional Materials. Pupil's name may be written below the property stamp impression or on the property label. Pupils may appropriately mark lesson assignments, otherwise they shall not mark or write in instructional materials. Pupils shall not remove, deface, or damage barcodes on state-owned materials. (See Section 20 - Damaged Instructional Materials)

Section 16. No Deposits Charged on Instructional Materials. No board or agent thereof shall require a pupil to pay a deposit on any free materials issued by the SCDE.

Section 17. Instructional Materials to be Returned by Pupils. Materials shall be turned in to the school by the pupil, parents or guardians under the following circumstances:

- A. When appropriately requested by a teacher or school official.
- B. When the course is completed or discontinued by the school or pupil.
- C. When the pupil withdraws from school.
- D. At the end of the school year.

Section 18. Transfer Students. A school from which a pupil transfers shall make an appropriate notation on the pupil's transcript records as to whether all his or her materials were returned to the school and whether any damage or lost materials fees are unpaid. (See Sections 17, 19, and 20)

Section 19. Lost Instructional Materials. Schools may require pupils, parents or guardians to pay for instructional materials lost and the pupil, parent or guardian may be denied further benefits of the Free Instructional Materials Program until in compliance with this requirement. This requirement may be waived in instances where the judgment of the principal and/or responsible officials believe that the child is a victim of unusual circumstances. The school district shall be responsible for the cost. The report of lost instructional materials paid for and sales should be itemized by titles on an appropriate form sent to each school at the end of the school year. The schedule of charges shall be determined by the State Board of Education upon the recommendation of the SCDE. Fees collected for lost materials shall be remitted to the SCDE.

Section 20. Damaged Instructional Materials. Schools are required to collect appropriate damage fees from any pupil, parent or guardian for abuse or improper care of instructional materials and the pupil, parent or guardian may be denied further benefits of the Free Instructional Materials Program until in compliance with this requirement. This requirement may be waived in instances where the judgment of the principal and/or responsible officials believe that the child is a victim of unusual circumstances. The school or district shall be responsible for the cost. The amount to be charged in such cases shall be determined by the agent in charge of materials. In no case, shall the cost exceed the amount of charge applicable had the material been lost, provided that the pupil, parent, guardian

shall have the option of paying the damage fee or purchasing the material according to the schedule in Section 19 above.

Materials on which only a damage fee is collected shall remain the property of the state and shall remain with the school for further use.

Materials damage fees collected should be reported in a lump sum in the space provided on the annual instructional materials inventory form sent to each school at the end of the school year. Fees collected for damaged materials shall be remitted to the SCDE.

Section 21. Fire Loss. Materials destroyed or damaged beyond further use by fire in school buildings or private homes shall not be charged to the individual or school provided an official of the school furnishes the SCDE a certified list of the materials destroyed and the place and date of the fire.

Section 22. Contagious Diseases. Materials issued to a pupil having a contagious disease such as scarlet fever, diphtheria, etc., shall be burned by the local agent provided such destruction has been recommended by the physician attending the child. The local agent shall provide the SCDE with a certified list of the materials destroyed.

Section 23. Returning Instructional Materials to Central Depository. Schools or depositories shall not return used free instructional materials except when requested or authorized to do so by the SCDE. New instructional materials (materials which never have been put in use or tagged, stamped, or labeled) may be returned at any time. (See instructions below)

- A. Address all shipments to:
Central Depository
301 Greystone Blvd.
Columbia, South Carolina 29210
- B. Return instructional materials by completing the Return Form.
- C. When preparing the Return Form, list the instructional materials and follow the instructions on the form.

Section 24. Defective Instructional Materials. Defective materials should be clearly marked "DEFECT" on the outside of the front cover and the defect identified on the inside of the front cover or in a visible place on the outside of a non-book item. Return the defective materials as soon as possible to the Instructional Materials Central Depository and notify the responsible office at the SCDE whether a replacement or an inventory credit is desired.

Section 25. Disposition of Out-of-Adoption Instructional Materials.

- A. Out-of-adoption instructional materials are those for which the contracts with the publishers have expired.
- B. Schools shall return all new out-of-adoption instructional materials to the Instructional Materials Central Depository promptly after the expiration of the contract.

- C. Schools may continue to use a title on which the contract has expired as long as the title is available from stock owned by the state. Schools should continue to use such materials until they have carefully evaluated all newly adopted materials and selected those best suited to their needs. Schools may continue to use the old title for some grade sections and new titles for other grade sections if they wish.
- D. Schools which change to new titles may be requested to return all or a portion of the titles that are being discontinued. The remaining copies may be used or disposed of by the school. Maximum use should be made of these materials, such as additional text material including assignments for classroom work or consigned for home study.
- E. Out-of-adoption materials will be removed from the inventory of books charged to the school before the second year after the expiration of the contract with the publisher. Districts should attempt to dispose of out-of-adoption materials locally. Districts may dispose of those materials in any manner, including selling materials for the purpose of recycle or resale. Funds received by the sale of used materials must be used for the purchase of instructional materials or supplies.

Section 26. Consumable Instructional Materials.

- A. The SCDE will publish annually a listing of consumable instructional materials. Any materials not on the listing shall be considered non-consumable. Schools using non-consumable materials as consumable shall be responsible for the cost of replacement.
- B. Instructional materials such as workbooks, lab manuals, and test booklets that provide space for written comments and answers shall be classified as one-year consumables and considered consumed once issued to a student and used for instruction. One-year consumable materials issued to a student and used for instruction will be removed from inventory annually.
- C. Funds to replace consumable materials will be provided annually to the extent that an Appropriation is provided by the General Assembly for instructional materials with replacement of non-consumable materials having first priority.

Section 27. Accounts Must Be Settled. Fees for lost and damaged textbooks for the prior school year are due no later than December 1 of the current school year when invoiced by the SCDE. The SCDE may withhold textbook funding from schools that have not paid lost and damaged textbook fees by the payment deadline.

Section 28. Special Adoptions. Instructional materials, textbooks, or series not currently available from the SCDE that are subsequently added as a special adoption or a district adoption under Section 59-31-45 may be purchased with the district's existing allocation. The SCDE may limit the exchange of instructional materials replaced by special and district adoptions.

Section 29. Most Favored Purchaser. Pursuant to South Carolina Code, if publishers sell materials to any other person or entity at a lower price than the price offered to South Carolina, that reduced price automatically becomes the contract price for South Carolina. At the end of each calendar year, publishers shall submit a certified list of all contracts made with other entities during the calendar year just closed on all instructional materials for which the publisher has a contract in South Carolina. That list must include the contract price for those materials. The SCDE may direct the Central Depository to withhold payment for instructional materials purchased from non-responsive publishers or assess non-responsive publishers

liquidated damages in an amount equal to 5 percent of the contract price of all instructional materials under contract with the publisher, not to exceed \$5,000.