



School District of Beloit



Budget Manual

Revised June 2020



Prepared by the Office of Business Services
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An Equal Opportunity Employer

BUDGET MANUAL

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Section I

Overview



School District of Beloit



Committed to excellence and diversity, we strive to prepare all students to thrive in a rapidly changing world.



Students

Build a school system of choice by improving student performance in a safe and diverse school atmosphere.



Staff

Enhance the work environment so employees feel a sense of worth and value, encouraging others to join the district.



Fiscal

Monitor taxpayer investments wisely to protect and provide resources to the schools to deliver a quality education while playing an important role in economic development.



Infrastructure

Improve and maintain district facilities to provide quality instructional spaces and safe environments that add value to the community as a whole.



Communication

Leverage strategic communication tools to build and enhance relationships with all stakeholder groups, increase our presence in the community, and share our stories.

Section II

Budget Codes



School District of Beloit

ACCOUNT DIMENSION

ACCOUNT CODE: The School District of Beloit uses a 23-digit numeric account code that is set as follows:

FUND	TYPE	LOCATION	OBJECT	FUNCTION	PROJECT	LOCAL
10	E	442	111	110000	000	909000
General Fund	Expense/Revenue	Memorial	Teacher Salary	Regular Education	None	Salary/Fringe
What fund is paying for item?		What location will be paying for items?	What is being purchased/paid for?	What is the purpose of the program?	Is there a grant/4k paying?	(Optional) What department?

All accounts comply with the Wisconsin Uniform Financial Accounting Requirements (WUFAR).

FUND: The district classifies accounts into one of eleven different funds, each identified by a two-digit number. Each fund is an independent accounting entity consisting of a self-balancing set of asset, liability and equity accounts.

TYPE: This one-digit field defines what type of account it is – R=Revenue, E=Expenditure, A=Asset

LOCATION: This three-digit field is used to group accounts according to building/site.

OBJECT: This three-digit field is used to describe items or services being purchased (an expense or object) or the origin of funds (a revenue or source).

FUNCTION: This six-digit field indicates the purpose or program area for which an object is purchased.

PROJECT: This three-digit field describes a program for which we receive financial support from another governmental agency or a locally defined special project.

LOCAL: This six-digit field indicates a locally defined field (optional).

LOCATION NUMBERS FOR BUDGET (2020-2021)

<u>LOCATION</u>	<u>BUDGET LEADER</u>	
<i>Fund 10 - General Fund</i>		
112	Converse	Leah Gordon-Malott
113	Cunningham - General	Julio Lopez
513	Cunningham – Athletics	Joel Beard
114	Gaston	Fonda Lewis
115	Hackett	Ryan McReynolds
118	Merrill	Brandye Hereford
120	Robinson	Belinda McCarthy
123	Todd	Melody Wirgau
130	Private School Title 1	Peg Muehlenkamp
331	McNeel - General	Michelle Hendrix-Nora
531	McNeel - Athletics	Joel Beard
341	Aldrich - General	Joe Vrydaghs
541	Aldrich - Athletics	Joel Beard
351	Fruzen – General	Sara Norton-Ejnik
551	Fruzen - Athletics	Joel Beard
441	Beloit Learning Academy	Tina Goecks
442	Memorial - General	Emily Pelz
542	Memorial - Athletics	Joel Beard
6XX	Summer School (XX = location)	<i>*Principal at selected site</i>
730's	Carl Perkins-Vocational Ed.	Mitch Briesemeister
770	Title I	Peg Muehlenkamp
801	Office of Superintendent/Board	Sue Green (Interim)
802	Student Services	Missy Beavers
805	Teaching, Learning and Innovation	Peg Muehlenkamp
808	Community & School Relations	Monica Krysztopa
810	Facility Services	Sean Winters
812	Personnel Services	Tonya Williams
813	Technology Services	Jo Ann Armstrong
814	Business Services	Wendy LaPointe
816	Document Management Services	Jo Ann Armstrong
817	Wellness	Tonya Williams
827	District Wide Expenditures	Jo Ann Armstrong

LOCATION NUMBERS (CONT'D)

	<u>LOCATION</u>	<u>BUDGET LEADER</u>
	<i>Fund 21 - Expendable Trust</i>	
Locations	Fund 21 - Misc. Donations	Budget Manager
	<i>Fund 27 – Special Education</i>	
772	Flow Thru	Missy Beavers
780	EC: EEN Entitlement	Missy Beavers
818	Special Education	Missy Beavers
Locations		Budget Managers
	<i>Fund 50 - Food Service</i>	
809	Food Service	Jo Ann Armstrong
	<i>Fund 60 - Agency Fund</i>	
Locations	Agency-Fund 60 – Elementary	Elementary Principals
331	Agency-Fund 60 - McNeel	Michelle Hendrix-Nora
341	Agency-Fund 60 - Aldrich	Joe Vrydaghs
442	Agency-Fund 60 - Memorial	Emily Pelz
513, 531, 541, 542, 551	Athletics	Joel Beard
	<i>Fund 99 - Vocational Education and Cooperatives</i>	
730/731	Local Youth Apprenticeship 66.0301	Mitch Briesemeister
542	Boys & Girls Hockey and Soccer Co-op	Joel Beard

SOURCE (REVENUE) DIMENSION SUMMARY

200 REVENUE FROM LOCAL SOURCES

- 240 Payments for Services
 - 241 General Tuition—Individual Paid
 - 244 Payments for Services Provided Local Governments
 - 248 Transportation Fees—Individual Paid
 - 249 Transportation Fees—Private Agency Paid

- 250 Food Service Sales
 - 251 Pupils
 - 252 Adults
 - 259 Other Food Service Sales

- 260 Non-Capital Sales
 - 262 Supply Resales
 - 263 Sale of Vocational Education Projects
 - 264 Non-Capital Surplus Property Sale

- 270 School Activity Income
 - 271 School Co-Curricular Admissions
 - 272 Community Service Fees
 - 279 Other School Activity Income

- 290 Other Revenue from Local Sources
 - 291 Gifts, Fundraising, contributions and development
 - 292 Student Fees
 - 293 Rentals
 - 295 Summer School Revenues
 - 297 Student Fines

900 OTHER REVENUES

- 980 Medical Service Reimbursements
 - 989 Other Medical Service Reimbursement

- 990 Other Miscellaneous Revenues

OBJECT (EXPENSE) DIMENSION - DEFINITIONS

An object indicates what service or commodity is being acquired.

100's – SALARIES (Site Based, location 909000 district paid)

This accounting system includes both salaries and wages within the scope of the term “salaries.”

Salaries are gross amounts (i.e., before deductions) paid to employees who are actually on the district payroll for services rendered to the District and for time spent on medical leave, holidays, sabbaticals, etc. Amounts paid as an indirect consequence of salaries (e.g., retirement, social security, insurance) and often as a fixed percentage of salaries, are recorded under object 200. Amounts paid to private employers (including self-employed individuals) for personal services are recorded in the 300 object series. Do not record as salaries, any amounts paid to individuals who are not on the District payroll.

111	Teacher
112	Administrator
113	Technical/Other Professional
114	Admin Assistant/Support
115	Clerical/Secretary
116	Instructional Support
117	Coordinator
118	Paraprofessional
120	Crossing Guard
122	Monitor/Noon Hour
123	Intern
124	Tutor
125	Student Worker
132	Event Worker
133	Addendum
135	IEP Meeting (Teacher/Special Education)
141	Teacher Additional
144	Admin Assistant Additional/Overtime
145	Clerical Additional/Overtime
146	Instructional Support Additional/Overtime
147	Coordinator Additional/Overtime
148	Paraprofessional Additional/Overtime
171	Sub Teacher
172	Sub Security Guard
174	Sub Clerical
175	Sub Aide
178	Sub Crossing Guard
179	Sub Nursing/Health Room Assistant

200's - EMPLOYEE BENEFITS (primarily used in local 909000)

Employee benefits are amounts paid by the District on behalf of employees over and above gross salaries, and often as a percentage of salaries. Such payments may be required by law or by contract. Payments should be made from the same fund which the corresponding salaries are paid.

212	Retirement Employer
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- 218 Other Post Employment Benefits (OPEB)
- 220 FICA and Medicare
- 230 Life Insurance
- 242 Health Insurance
- 243 Dental Insurance
- 251 LTD Insurance
- 291 College Credit Reimbursement

300's - PURCHASED SERVICES

Payments for services rendered by personnel who are not on the payroll of the district, which the district obtains from private or public agencies. While a *product may or may not result from the transaction, the primary reason for the purchase is the service provided.* The purchase price usually includes, without itemization, the salary and benefits paid to any persons involved, the cost of objects (whether non-capital or capital used or furnished), and the cost of transporting or furnishing the goods and services.

- 310 Personal Services - services that can be performed by individuals, not district employees with specialized skills and knowledge. Payments to private or non-profit organizations for support services are also coded here. While some incidental supplies or equipment or travel may be included in the cost of this type of purchased service, the primary reason for the expenditure is acquiring the use of the human being involved. Examples include architects, consultants, doctors, officials, assembly programs and temporary typists. District paid stipends to non-employees. **Conference registrations fees are recorded here; however, conference registration costs paid to CESA are coded to Object 386.**
- 321 Technology Related Repairs and Maintenance – Expenditures for repairs and maintenance services for technology equipment that are not directly provided by school district personnel, should be recorded here. This includes ongoing service agreements for technology hardware. (personal computers and servers)
For maintenance/repair use sub function:
 - 221500 - Instructional Technology (operation and support of computer learning labs, media center computer labs, instructional technology centers, instructional networks, etc.)
 - 254410 – Instructional Equipment (instruments, microscopes, etc.)
 - 295000 – Administrative Technology Services (technology related administrative costs)
- 322 Rentals of Computers and Related Equipment
Expenditures for leasing or renting computers and related equipment for both temporary and long-range use.
- 324 Non-Technology Related Repairs and Maintenance
Used only with functions and sub-functions in the 253000, 254200, 254300, 254410, 254490, 254500, 254900, 256500, 256600, 257000, 310000 and 390000 series
Contracts and agreements covering the upkeep of buildings and non-technology equipment, such as camera installation.
- 325 Vehicle and Equipment Rental
Expenditures for leasing or renting equipment or vehicles for both temporary and long-range use by the school district. This includes bus and other vehicle rental when operated by a local school district and similar rental agreements. Include rental vehicles for driver's education programs

here. This code excludes costs associated with the rental of computers or other technology-related equipment. These costs should be coded to expenditure Object 322.

- 326 Site Rental
Sites rented for district use. Used with Function 255000. Sites that are acquired by a ‘capital lease’, ‘land contract’, or ‘installment purchase’ is coded to Object 511
- 327 Construction Services
Includes amounts for construction, renovating, and remodeling buildings or infrastructure assets paid to contractors. This code should be used to account for the costs of nonpermanent site improvements, such as fencing, walkways, and roads, that are related to buildings and building sites. Used only with Function 255000.
- 328 Building Rental
Buildings rented for district use. Used with Function 255000. Buildings that are acquired by a ‘capital lease’, ‘land contract’, or ‘installment purchase’ is coded to Object 531.
- 329 Cleaning Services
Services purchased to clean buildings (apart from services provided by the school district employees), including, but not limited to, disposal services, snow plowing, custodial services, and lawn care services. Used with Function 253000.
- 330 Utilities (primarily used in location 810) - services usually provided by utility companies include water, sewerage, electricity, natural gas, and garbage collection, and are recorded here regardless of whether the utility or service is publicly or privately owned.
- 340’s Travel - costs incurred in transporting pupils and employees when such services are provided by contract or agreement.
 - 341 Pupil Travel - includes all costs of pupil travel between home and school, on field trips, on spectator buses and for extra-curricular activities. Includes transportation costs for students between school sites. Use new sub functions:
 - 256740 – Athletic Trips
 - 256770 – Field Trips
 - 256795 – Other Pupil Transportation
 - 342 Employee Travel - payments for the travel expenses of district employees on district business or staff development activities, including transportation costs, meals, lodging, and incidentals.
 - 345 Pupil Lodging and Meals – Meals and lodging for pupils traveling or placed in instructional programs outside of their resident district. Included are meals and lodging for co-curricular activities and field trips.
 - 348 Vehicle Fuel – Fuel (gasoline, natural or liquefied petroleum gas) used for vehicle operation.
- 350’s Communication - involves services to assist in transmitting and receiving information.
 - 351 Advertising - expenditures for printed announcements in periodicals and newspapers or announcements broadcast by radio and television are recorded here. These expenditures

include advertising for such purposes as personnel recruitment, legal notices, bond sales, and used-equipment sales.

- 353 Postage/Cartage - expenditures for “Freight Out” including postage and the transportation of district goods by a commercial carrier.
- 354 Printing and Binding - expenditures for designing, laying out, printing, and binding are recorded here. Textbook rebinding is recorded in Object 470.
- 355 Telephone and Telegraph - expenditures including rental of telephone switchboards are recorded here.
- 358 On-Line Communication - use of computers and modems to access electronic bulletin boards, mail and data bases.

- 360 Data Processing and Coding Services
Used with all functions and sub-functions in the 212000, 213000, 217000, 240000, 252000, 258000, 259000, 295000, 310000 (fund 80) and 390000 (fund 80) series
Expenditures for technology services. Include here data entry, formatting, and processing services other than programming. Include here software as a service, data storage services, cloud based computing arrangements, and monthly or annual technology “term license” and/or fee based software and services. Could also include subscriptions, ebooks, and apps if they are renewable on a monthly or annual basis. Payments to other districts, CESAs and other governments are coded to the object 380 series.
- 370 Payment to Non-Governmental Agencies – Payments for instructional programs to private or non-profit organizations. This object number may only be used function 431000 regular education or function 436000 special education. Payments to other districts, CESA’s, and other governments are coded to object 380 series.
- 380’s Intergovernmental Payments for Services - this object series includes payments to other governmental units for services rendered to the paying district. This object number may only be used with a 200000 support function.
 - 381 Payment to Municipality
 - 382 Payment to other Wisconsin School Districts
 - 383 Payment to a CCDEB – Transit of Aid
 - 384 Payment to a Non-Wisconsin School District
 - 385 Payment to County
 - 386 Payment to CESA (Services only) – **Includes conference registration costs paid**
 - 387 Payment to State
 - 388 Payment to Federal Government
 - 389 Payment to WTCS (Wisconsin Technical College System – Vocational Education)
- 390 Intergovernmental Payments for Services – Purchased IEP Medical Services

400's -NON-CAPITAL OBJECTS

Non-capital objects include items of an expendable nature that are consumed, worn out, or deteriorated by use (supplies); lose their identity through fabrication or incorporation into different characteristics of equipment, but are not expensive enough to capitalize (non-capital equipment); and have the characteristics of non-capital equipment but also serve as a communicative function (media). Freight charges are to be included when recording the cost of goods purchased.

- 410's Supplies and Materials - items of an expendable nature that are consumed, worn out or deteriorated by use; or items that lose their identity through fabrication or incorporation into different or more complex units or substances.

- 411 General Supplies – supplies, items that are consumed, worn out, or deteriorated through use and not required to be coded to another object account. Workbooks should be coded to object 470. Vehicle fuel should be coded to object 348. This classification will include such items as small marking devices, fastening devices, instructional games, cleaning materials, trophies and other awards, wax, bulbs, toilet paper, paper towels, pencils, paper clips, preprinted forms, commercially produced tests, eating utensils, paper supplies and medical supplies.

- 415 Food - includes meat, vegetables, baked goods, milk products, beverages, candy and similar items intended for human consumption, whether in prepared condition or not at the time of purchase. Do not include items intended for animal consumption, list these under Object 411.

- 420 Apparel - includes items intended to be worn on the human body except prosthetics like glasses and hearing aids. Apparel includes clothes, such as shirts, blouses, pants, skirts, shoes and socks; protective gear such as aprons, goggles, shoulder pads and overshoes; costumes and uniforms.
CAN ONLY BE USED IN FUNCTIONS: 100000, 214000, 218000, 219000, 253000, 254000 (except 254600), 257000, 258000.

- 430 Instructional Media Materials, other than textbooks and rentals that serve an instructional function and are not classified as a supply or equipment. Include expenditures for online instructional software and related licenses. If the item is cataloged and housed in a central library or media center, function 222200 “Library Media” is used. If the items are housed in a classroom, the appropriate instruction function (function number starts with a “1”) should be used. Include here the cost of site licenses for instructional software purchases. Expenses previously coded to 431, 432, 433, 434, 435, 438 and 439 should now be coded to 430.

Audiovisual Media. Items that communicate primarily through other than the printed word such as film, maps, charts, displays, study prints, records, cassettes, globes, video or audio tapes, and similar items.

Library Books. Books which are purchased in limited quantity and usually kept in a library media center. Included here are costs of library book rebinding and repair.

Newspapers. Newspapers purchased to be housed in the library.

Periodicals. Magazines and other recurring publications purchased to be housed in the library.

Programmed Computer Software. Pre-programmed computer operating system and applications. Included here are associated manuals, documentation and cost of assistance or updates. Also included here are library automation software and related software components or licenses.

Microfilm. Microforms of existing books, periodicals or other print media, or original microform publications.

Other Media. Reference books, sets of encyclopedias in book form or on CD Rom, pamphlets, bulletins and manuals.

440's Non-Capital Equipment – Items that have the characteristics of equipment but with a small unit cost (**more than \$250 but less than \$2,500**). Any items over \$2,500 would be recorded in a 500 series object.

449 Other non-capital equipment. Included here are containers, desks, computers, monitors and other building furnishings, measuring devices and other equipment. Computers and monitors should be considered as separate units when purchased. (Example: if the computer costs \$400 and the monitor costs \$120, each unit is under \$500 and should be coded to 449.)

452 Objects for resale - non-capital objects purchased specifically for resale.

470 Textbooks and Workbooks – Instructional books (other than library and reference), sheet music and workbooks acquired for instructional use. The cost of textbook rebinding and repair is also included here. Library books are recorded under Object 430.

480 SUPPLIES—TECHNOLOGY RELATED

Technology related supplies include supplies that are typically used in conjunction with technology-related hardware or software. Some examples are CDs, flash or jump drives, parallel cables, charges, cords, and monitor stands. Software costs (single purchase only) below the capitalization threshold (5,000.00) should be reported here. Could also include subscriptions, ebooks, and apps with no reoccurring renewal costs. Licenses and fees for services such as subscriptions to research materials over the Internet should be reported under Object 350, Communications

500's CAPITAL OBJECTS

Capital objects include items of a permanent or enduring nature, which are of value for a period longer than the fiscal year in which acquired. Rentals are included here as they are costs in lieu of purchase.

Capital objects purchased **must** be reported to the Finance Office on inventory control forms. Those assets will be added to the District's fixed assets for reporting purposes. **Any item over \$2,500 is recorded in the 500 series.**

510 Sites - include here the value of land and improvements acquired for district purposes. Also include here the value of existing buildings that are removed to prepare the site for another purpose. Land that is acquired along with a building where the intention of the purchase is to acquire the building for district use, rather than the site, should be coded to object 530 "Buildings".

520 Site Components – include here items such as curb and gutter, sidewalks, driveways, flagpoles, installed playground equipment, trees and bushes. This account is used when the improvement is installed by district staff or district purchased for installation by a contractor.

530 Buildings – Expenditures for existing buildings acquired by the district is included here. Buildings constructed for the district by other than district staff are coded to Object 320, “Property Services.”

531 Building Acquisition
537 Rentals

550’s Equipment/Vehicle Addition

Expenditures for equipment, including vehicles that are not replacing existing items. Equipment is any instrument, machine, apparatus, or set of articles which (1) retains its original shape and appearance with use, (2) retains its identity (i.e., is not incorporated into a larger or more complex unit), (3) is free standing or mobile (i.e., not attached to land or buildings) and (4) items of a permanent or enduring nature that **unit** cost is \$500 or more.

551 Equipment Purchase/Vehicles–Addition (Non-Depreciated) - for equipment that unit cost is between \$2,500-\$4,999.99
553 Equipment Purchase/Vehicles (Depreciated)–Addition - for equipment that unit cost is \$5,000 or more

570’s Rental of Equipment/Vehicles

571 Equipment Rental
572 Vehicle Rental

580’s Technology

581 Technology Related Hardware - Expenditures for technology related equipment and technology infrastructure that meets or exceeds the \$5,000.00 district capitalization threshold. These costs include those associated with the purchase of network equipment, servers, PCs, printers, other peripherals, and devices. Technology related supplies that do not meet the threshold should be coded to object code 480.
582 Technology Software - Expenditures for purchased software used for educational or administrative purposes that exceed the capitalization threshold. Expenditures for software that meet the standards for classification as a supply should be coded to Object 480.

900’s OTHER OBJECTS

930’s Revenue Transit

935 State Grants Transited to Others – payments to other districts resulting from participating in state funded consortium or “mini-grant” programs. Transit of state handicapped aid is coded to object 936 “Transit of Handicapped Aid.”

- 937 Federal Grants Transited to Others – payment to other district resulting from participating in federally funded consortium or “mini-grant” programs.
- 940 Dues and Fees – expenditures for membership in professional or other organizations. Also included here are: bank service charges for checking accounts, vehicle license, registration fees and field trip admission fees. Expenses previously coded to 941, 943 and 949 should now be coded to 940.
- 960 Adjustments
- 970’s Refund of a Receipt - money paid out during the current fiscal year due to an overpayment to the district in a prior fiscal year is charged to this object and to the fund in which the original receipt was received. NOTE: *A refund during the same fiscal year the receipt/revenue was received should be treated as an abatement to the account in which the original receipt was recorded. (Usually a revenue or source code instead of an expenditure or object code.)*
- 971 Aidable Refund Payment - payments refunding prior year revenues that were included in deductible resources for equalization aid computation in prior years. Expenditures coded to this account increase shared cost in equalization aid computation.
- 972 Non-Aidable Refund Payment, Property Tax Chargeback and Equalization Aid Payment – payments refunding prior year revenues that were not used to reduce district shared cost in one equalization aid formula. Included here are refunds of state general aid and property taxes (e.g., property tax “chargebacks” and payments to district taxpayers for exceeding revenue limits).
- 980’s Medical Service Reimbursement Transmittal
- 981 Medicaid Receipts Transmitted to Others
- 989 Other Medical Reimbursements Transmitted to Others
- 990’s Miscellaneous

MAJOR FUNCTIONS

<u>Function</u>	<u>Description</u>
100 000	INSTRUCTION
110 000	<i>Undifferentiated Curriculum</i>
120 000	<i>Regular Curriculum</i>
121000	Art
122000	English Language
122100	Reading
123000	Foreign Language
124000	Mathematics
125000	Music
125400	Vocal Music
125510	Band
125520	Orchestra
126000	Science
127000	Social Science
129000	Other Regular Curriculum
129100	Career Ed
129120	Children At Risk
129125	Even Start Instruction
129140	Transition Program
129150	Education for Employment
129200	Bilingual/Bicultural
129300	Computer Assisted Instruction
129600	Environmental Education
129700	Youth Liaison
130 000	<i>Vocational Curriculum</i>
131000	Agriculture
132000	Business
133000	Marketing
134000	Health Occupations
135000	Family and Consumer Education
135200	Home Economics, Family Focus
135220	Child Development
135300	Occupational Preparation
135310	Child Services
135330	Food Services
136000	Technology Education
138000	Vocational Special Needs
139000	School Age Parent
140 000	<i>Physical Curriculum</i>

141000	Health
142000	Safety
143000	Physical Education
144000	Recreation
145000	Driver's Education
149000	Other Physical Curriculum (JROTC)
<i>150 000</i>	<i>Special Education Curriculum</i>
152000	Early Childhood (EC)
156100	Deaf and Hard of Hearing Impairment (H)
156200	Homebound: Special Education (HB)
156600	Speech/Language (S/L)
156700	Visually Impaired (V)
156800	Hospital Instruction (HS)
158000	Special Education Combined Cost Reporting (CCR)
	Cognitive Disability
	Emotional Behavioral Disability
	Specific Learning Disability
	Orthopedically Impaired
	Other Health Impaired
159100	Special Education Program Educational Assistants
159200	Special Education Short-term Substitute Teachers
159300	Special Education Specialty Teachers
<i>160 000</i>	<i>Co-Curricular Activities</i>
161000	Academic
161339	Forensics
162100	Athletics – Female
162105	Basketball – Female
162107	Knightingales – Female
162108	Cross Country – Female
162112	Golf – Female
162116	Soccer – Female
162117	Softball – Female
162118	Tennis – Female
162119	Track and Field – Female
162120	Baton – Female
162121	Volleyball – Female
162124	Swimming – Female
162200	Athletics – Male
162204	Baseball – Male
162205	Basketball – Male
162208	Cross Country – Male
162210	Football – Male
162212	Golf – Male
162216	Soccer – Male
162218	Tennis – Male
162219	Track and Field – Male
162221	Volleyball – Male

162222 Wrestling – Male
162223 Ice Hockey – Male
162224 Swimming – Male

163000 Music
163312 Music Production
164000 School/Public Service
166000 Classes

170 000

Special Needs

171000 Culturally/Socially Disadvantaged
172000 Gifted & Talented
172500 Youth Options
173000 Non-Special Education Homebound
174100 School Age Parent Classroom (SAPCL)
174200 School Age Parent Homebound (SAPHB)
179000 Other Special Needs
179100 Alternative Education
179110 ISS Program

200 000

SUPPORT SERVICES

210 000

Pupil Services

211000 Direction of Pupil Services
212000 Social Work (SW)
213000 Guidance
213400 Even Start Coordination
213500 Gender Equity
213900 Other Guidance

214000 Health Services
214200 Medicaid Reimbursement Services - Medical
215000 Psychological Services (PS)
216000 Speech Pathology and Audiology Services
217000 Attendance
218100 Occupational Therapy (OT)
218200 Physical Therapy (PT)
219000 Other Pupil Services

220 000

Instructional Staff Services

221100 Direction of Improvement of Instruction
221200 Curriculum Development
221250 Academic & Equity Affairs
221300 Instructional Staff Training
221400 Professional Library
221500 Instruction Related Technology
221900 Other Improvement of Instruction
222000 Library Media
222100 Director of Library Media
222200 Library Media Resources and Services

223000 Supervision and Coordination

223100	Athletics
223300	Special Education Supervision and Coordination (LS)
223700	Vocational Education
223900	Other Instructional Staff Supervision & Coordination
229000	Other Instructional Staff Services
<i>230 000</i>	<i>General Administration</i>
231000	Board of Education
231100	Board Members
231400	Election
231500	Legal
231600	School Census
231700	Audit
231900	Other Board of Education
232000	District Administration
232100	Office of Superintendent
232200	Community Relations
232500	Program Development
232900	Other District Administration
<i>240 000</i>	<i>School Building Administration</i>
241000	Office of the Principal
<i>250 000</i>	<i>Business Administration</i>
251000	Direction of Business
252000	Fiscal/Finance
253000	Operations
253100	Director of Operations
253200	Sites
253300	Buildings
253400	Equipment
253500	Vehicle Servicing – not pupil transportation vehicles
253600	Vehicle Acquisition
253700	Security Services
253900	Other Operation
253950	Painting
253960	Furniture
254100	Direction of Maintenance
254200	Sites Repairs
254300	Buildings Repairs
254391	Electrical
254392	Plumbing
254393	HVAC
254394	Landscaping
254410	Instructional Equipment Repairs
254490	Other Equipment Repairs
254500	Vehicle Maintenance – not pupil transportation vehicles
254600	Maintenance Vehicle Acquisition
254900	Other Maintenance
255000	Facilities Acquisition/Remodeling

255100 Construction
255200 Purchase
255300 Remodeling
255400 Rental in Lieu of Purchase

256700 Contracted Transportation
256710 Regular Transportation (Home to School)
256720 Shuttle Services
256730 Parent Contract (Home to School)
256740 Co-Curricular Activities
256750 Special Education (Contracted Specialized Transportation)
256758 Private Contracted Transportation
256759 Community Integration
256760 Integration
256770 Field Trips
256790 Other Contracted Transportation
256900 Other Pupil Transportation

257000 Food Services
257100 Direction of Food Service
257200 Food Preparation and Dispensing
257300 Food Delivery
257900 Other Food Service

258000 Internal Services
258400 Production Room
258440 Print Shop
258500 Mail
259000 Other Business Administration

260 000 Central Services
261000 Direction of Central Services
262000 Program Research and Accountability
263000 Information
264100 Human Resources and Negotiations
264200 Recruitment & Placement
264400 Non-instructional Staff Training
264500 Employee Health Services
264800 In-district Travel
266000 Technology Services

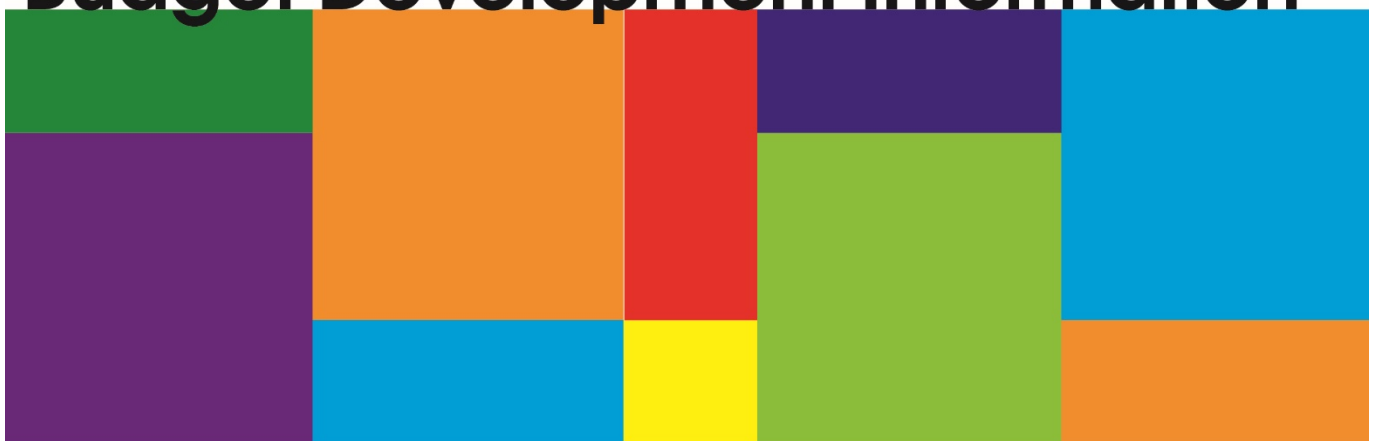
270 000 Insurance and Judgments

290 000
295000 Administrative Technology Services

500 000 DISTRICT-WIDE (Use Only with a Source/Revenue Code)

Section III

Budget Development Information



School District of Beloit

COST ANALYSIS

Proposals for additional staff should use the **estimated** 2019-2020 salary and benefit information provided below. The actual costs for existing individual staff members should be obtained by calling the Executive Director of Business Services (361-4015) or the Director of Finance (361-4011).

OBJECT	PROFESSIONAL EDUCATOR	SECRETARY (212 Day)	PARA- EDUCATOR
111, 115 Salaries	55,270	26,247	
118 Salaries			19,350
212 Retire ER 6.75%	3731	1772	1306
220 FICA 7.65%	4,228	2008	1480
230 Group Life Ins..00167%	92	44	32
242 Health Ins. (Family)	19,595	19,595	19,595
243 Dental Ins. (Family)	1,524	1,524	1,524
251 L.T.D. Ins. .002899%	160	76	56
BENEFIT TOTAL	29,330	25,018	23,994
TOTAL SALARY & BENEFITS	\$84,600	\$51,265	\$43,344

*6 ½ hour employee

EXTRA TIME: PROFESSIONAL EDUCATORS

Curriculum Writing	\$20.97/hour
FICA – 220	7.65%
Retirement – 212	6.75%

LUNCHROOM SUPERVISION

		** PROFESSIONAL EDUCATOR	PARA- EDUCATOR
Salary	122	\$2,100 (elementary)	
	122	\$1,932 (intermediate)	Para-educator rate
Fringe	212 – Retire ER	6.75%	6.75%
	220 – FICA	7.65%	7.65%

**If not receiving addendum contract.

School District of Beloit (District) Budgeting and Purchasing Technology Guidelines

Purpose

These guidelines are to explain how the District handles the budgeting and purchasing of technology infrastructure, hardware, and software and technology applications. The District's role is to achieve the best possible pricing in accordance with Board policy as well as to meet District goals such as delivery times, standardization, warranty coverage and/or to effectively maintain District technology.

The District uses a tech request system in order to expedite our quality technology services and technology purchases. You may enter a tech request through the following link:

<https://sdb.zendesk.com/access/unauthenticated>

Purchase of Technology Items:

The standardization of hardware and software are necessary to the Technology Services Provider providing fast, efficient service and support to the schools. In a continuing effort toward providing technology equipment that can be supported by our infrastructure and support staff. The guidelines below must be followed when computer software and hardware are purchased for your school:

- The Technology Serviced department will only solicit pricing for District use, personal use purchases will not be made using District time or staff.
- The Technology Service Provider must be consulted prior to the purchase of all computer hardware and software
- Any upgrades or changes to equipment must be reviewed by technology staff for compatibility with our infrastructure and supportability by technology staff.
- These guidelines apply to items that connect or upgrade existing technology equipment. If you are interested in purchasing standalone items that will not be supported by the technology department and instead would be replaced less than \$500, such as boom boxes, CD & DVD player and burners, these guidelines will not apply.
- If you have problems with equipment or software you have just purchased, please enter a tech request
- The District does not purchase cell phones
- If your equipment was stolen and needs to be replaced, please see below.
- Return requests are handled individually through a tech request

Vandalism, Lost or Stolen or Damaged Equipment:

Intentionally damaging technology equipment (vandalism) may result in the cancellation of privileges, and/or other discipline, up to and including expulsion. Vandalism is defined as any malicious attempt to harm or destroy data of another user or organization, irresponsible behavior in and around computing equipment, hacking and physical damage to any network component, or as otherwise defined by law. The School District of Beloit reserves the right to recover its expenditures associated with a vandalism incident in accordance with Wisconsin laws and School District of Beloit Policies such as Policy 368, which may include:

- Access to district-owned or operated technology limited or denied.
- Discipline and/or termination.
- Restitution for property damage including the right to make a payroll deduction for the costs of repair and/or replacement.
- Legal action.

Please be advised that employees may be held financially responsible for the damage of technology equipment or for any unauthorized financial commitments made through the Internet. All rules in the sections above apply wherever technology equipment is being used. Employees are responsible for the care of their technology equipment. Property Loss and Damage through vandalism and/or negligence will be treated the same.

Individuals who have not provided a Police Report or who have damaged or misplaced their device due to negligence will be charged or the building budget for which the student resides in will be charged for the damaged or misplaced device.

Estimates of Delivery:

Generally speaking, the following delivery estimates apply to your technology purchases however; vendor or manufacturer backlogs and/or quotes and bidding results can delay the delivery of your purchase. Please contact Technology Services through a tech request if you have questions about the delivery of times for your specific order:

The following are estimates not guarantees:

Apple laptops and desktops is 2-3 weeks

LaserJet printers is 2-3 weeks

Mobile Lab carts is 4-5 weeks

PC laptops, desktops and monitors is 3-4 weeks

Peripherals (mice, keyboards, projectors, scanners, etc) is 2-3 weeks

RAM is 1-2 weeks

Software is 1-2 weeks

Smart boards is 5-6 weeks

Delivery and Installation of Purchases

You will be contacted by our Technology Service staff regarding delivery and installation. The cost for delivery and installation is included in the purchase price. It is important to work with our Technology Staff so that we can prepare for onsite delivery and installation in advance of your anticipated need.

Budgeted Funds

If the item you are considering for purchase is an item that is known and approved for purchase by the Technology Department the cost will be charged to the appropriate department or building budget. The budget manager shall submit the purchase request so that their permission can be verified. *(Student devices that are damaged or misplaced will be reported to the building secretary. The building secretary than has the ability to pass along the fees to the student. If the building decides to not pass along these fees, the building budget will be responsible for paying the replacement cost for the damaged or missing device.)*

Disposal of old/obsolete/inactive software or hardware:

Please enter a tech request regarding disposal of inactive technology assets. Many technology assets must be e-cycled in accordance with approved EPA and state regulations.

Ricoh Devices:

If you need toner in your Ricoh devices, please contact Jamy at 608-361-3622, if you need technology support for your Ricoh device, including moving or installing a new piece of equipment, please submit a tech request and include in the request that it is a Ricoh device.

Donated Equipment

Technology donations are a great source of low cost equipment, but in order for them to be properly supported within the District environment, a number of critical items must be considered (both financial and standards based) in order for the donation to be accepted. Please enter a tech request in order for a donation of technology equipment to be considered.

LIBRARIES AND MEDIA

Statutes (Wis., Stats. s.s 43.70) requires that Common School Fund moneys “shall be expended for the purchase of library books and other instructional materials...in accordance with rules promulgated by the state superintendent.” The guidelines published by the DPI requires the funds be expended in object 430 for audiovisual media, library books, newspapers, periodicals, programmed computer software, microform, and other media housed in the library (Function 222200). The DPI allows common school funds to be used for purchasing computers for the library, code to 550’s. Request for purchase should be requested in the Educational Programs Department. Separate components are not eligible (i.e. a monitor purchased separately).

Following are definitions of those items that qualify for common school funding. Principals will need to work with teachers and library staff to assure these items are budgeted in the library budget (Function 222200).

430

Audiovisual Media. Items that communicate primarily through other than the printed word such as film, maps, charts, displays, study prints, records, cassettes, globes, video or audio tapes, and similar items.

Library Books. Books which are purchased in limited quantity and usually kept in a library media center. Included here are costs of library book rebinding and repair.

Newspapers. Newspapers purchased to be housed in the library.

Periodicals. Magazines and other recurring publications purchased to be housed in the library.

Programmed Computer Software. Pre-programmed computer operating system and applications. Included here are associated manuals, documentation and cost of assistance or updates. Also included here are library automation software and related software components or licenses.

Microfilm. Microforms of existing books, periodicals or other print media, or original microform publications.

Other Media. Reference books, sets of encyclopedias in book form or on CD Rom, pamphlets, bulletins and manuals.

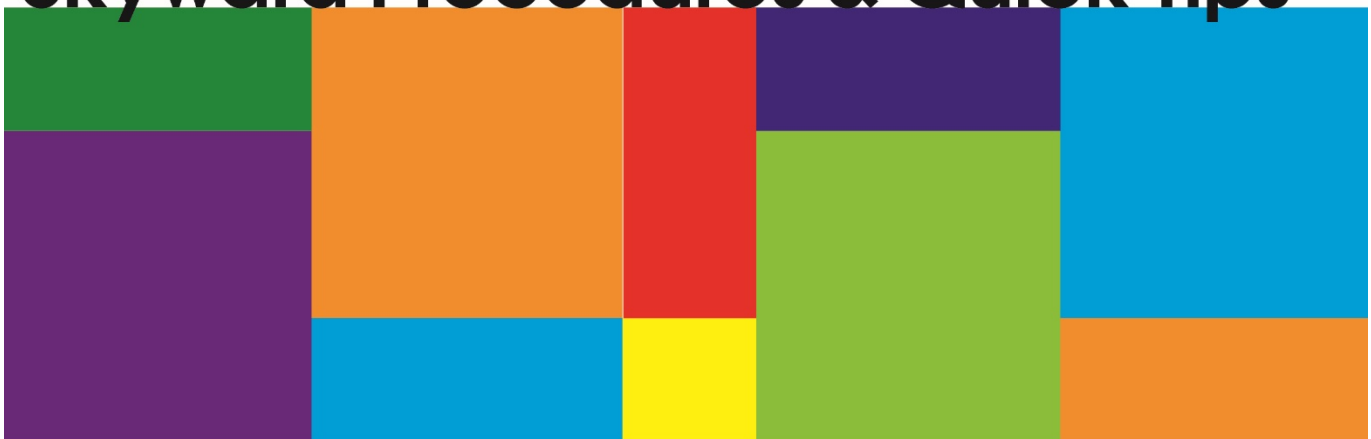
551 - Additional computer purchased for the library

To assure compliance, it is necessary that library budgets are properly prepared and expenditures properly recorded. For example, it is not permissible to purchase Weekly Reader’s with these funds. However, it is permissible to require that all purchases of computer programs or limited copies of supplemental readers be purchased from the library budget and cataloged and normally housed in the library. The website address for more detailed information is <https://dpi.wi.gov/common-school-fund/questions>.

The Finance Office will provide each principal with the minimum dollar amount that is required to be budgeted and expended for Library Aid purposes.

Section IV

Skyward Procedures & Quick Tips



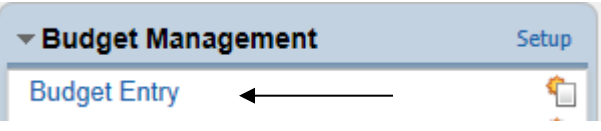
School District of Beloit

Skyward Web: Budget Entry


1. Go to the Beloit School District home page, click on For staff, Essential Links, then scroll down and click on Skyward Business (Skyport)
2. Log in to your Skyward Business (Skyport)

3. Click on  and click on Financial Management 

4. Click  tab.

5. Go to  click on Budget entry

6. Click on your building budget report

7. On the right hand side click 

8. Enter in the appropriate amounts into the correct account numbers. (Are you able to go right down the list by hitting enter on 10 key pad.)

If you have any questions please email or call Jo Ann Armstrong at jarmstrong@sdb.k12.wi.us or 361-4011.

Skyward Web: Budget Transfers

Budget transfers allow users to offset over budget account numbers by transferring budget figures from one account number to another. Some items to note:


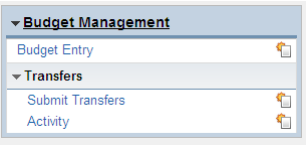

- **Transfers should be made at minimum once a month with negative balances eliminated by the 15th of each month.**
- Transfers should be made when any given applicable account number is over budget by more than \$25.00. (Do not include change in your transfers)
- Consider transferring enough funds to cover incurred costs and to “pad” the account number for unexpected additional costs such as: shipping and handling charges and incorrect pricing listed on purchase orders.

9. Go to the Beloit School District home page, click on For staff, Essential Links, then scroll down and click on Skyward Business (Skyport)

10. Log in to your Skyward Business (Skyport)

11. Click on  and click on Financial Management 

12. Click  tab.

13. Click  on the  menu. If you do not see the options, make sure to click the  located to the left of Transfers. This will open up the menu options.

14. Click .

15. Make sure you are entering transfers in the correct fiscal year.

* Fiscal Year:


16. The transfer type should be Transfer Type:

17. Enter a Batch Number using the department/site and date of entry. Ex: RO022113, For Robinson, GA022113 for Gaston, HS022113 for High School, etc.

18. Enter description.

* Description:

Tip: You

 can copy (Ctrl-C) and Paste (Ctrl-V) this description into the “Budget Transfer Detail Lines” as well. This may save keying time.

19. Enter account number (no spaces are required), description, and transfer amount for each general ledger

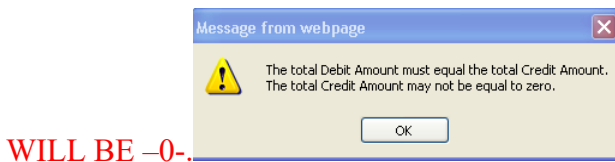
account. Select either or Debit Amount. “Transfer from” means you are

decreasing the account and “transfer to” means you are increasing the account.



Detail Budget Transfer	
General Ledger Account	
Account: 10E113 341 256770 000 000000 - GENERAL FUND/CUNNINGHAM/PUPIL TRAVEL	Transfer Amount: 1.00
* Description: Budget Transfer to cover negative monies	Debit Amount: 0.00 Credit Amount: 1.00

Detail Budget Transfer	
General Ledger Account	
Account: 10E113 342 221300 000 000000 - GENERAL FUND/CUNNINGHAM/EMPLOYEE TR	Transfer Amount: 1.00
* Description: Budget Transfer to cover negative monies	Debit Amount: 1.00 Credit Amount: 0.00

REMEMBER ENTRIES MUST OFFSET EACH OTHER-FOR EVERY INCREASE THERE IS A DECREASE; FOR EVERY DECREASE THERE IS AN OFFSETTING INCREASE. THE NET RESULT




20. Click .

21. If you run out of time you can click  and come back at a later time to finish the transfers. Make sure to click  when you are finished.



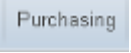
Other tips:

- Use  to get information about the budget balance in the specific account you are entering.
- If you are having any issues please email or call Jo Ann Armstrong at jarmstrong@sdb.k12.wi.us or 361-4011.


How to enter in a Requisition on the Web

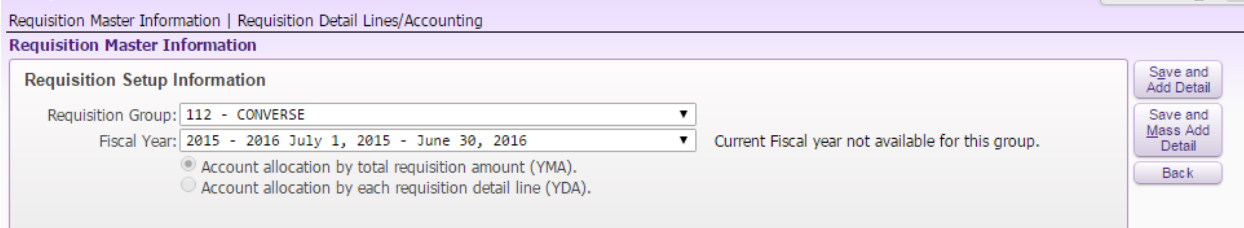
1. Go to the Beloit School District home page, click on For staff, Essential Links, then scroll down and click on Skyward Business (Skyport) – Log in

2. On the right hand side of the screen click on Financial Management

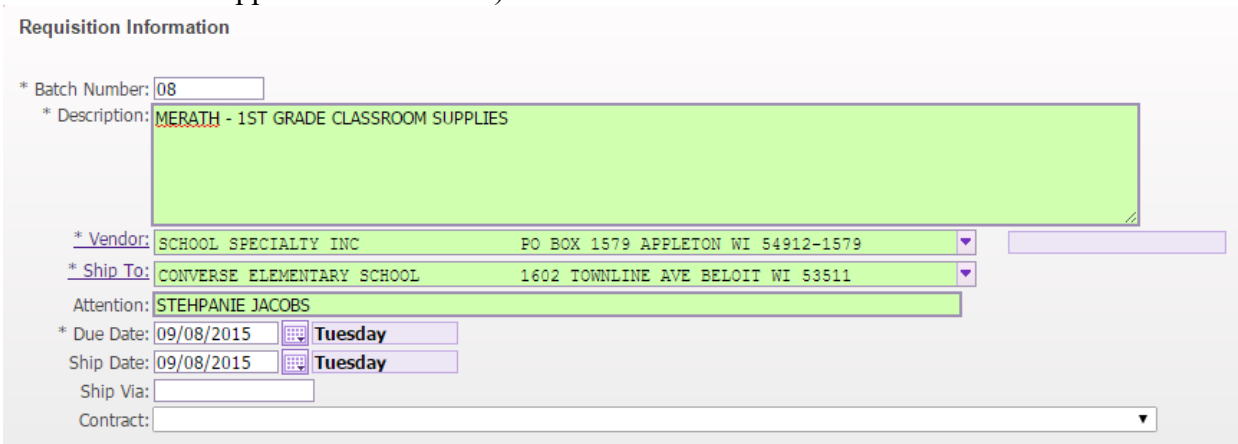
3. Then click on 

4. Under “My Requisition Processing” select  Requisitions


5. To add a requisition click on  on the right hand side of the screen. In the drop down box make sure to select the correct purchase order group (Ex. 112 – Converse)



6. Click on the drop down box to make sure that the fiscal year is correct. Leave the default option for account allocation. Tab down or click into the description box to enter in your details (Ex. Merath-Finance Office Supplies for Flu Clinic)



7. Tab down to vendor and start to enter the vendor’s name. (It will start to prepopulate). Make sure you choose the correct order from vendor, in some cases there are multiple vendor addresses for the same vendor. When entering Attention: by sure to include the name you want the order to go to, and also the building location they are at. You can leave the remaining fields alone.

8. Next, click on  or, if you know you will be ordering multiple items click on Save and Add Mass Detail. This will give you several Detail Lines and you won’t have to keep clicking save and add.

9. Here you will enter in your catalog number (if applicable), quantity, unit of measure, price and detailed description of what is being ordered.

Requisition Detail Lines

* Line Number:

Line Type: Merchandise Narrative

Catalog:

* Quantity:

Unit of Measure:

* Unit Cost:

Total Amount:

* Description:

10. Once you have entered in this information click on **Save** on the right hand side of the screen

11. If you would like to order more items click on **Add** on the right hand side. If you would like to edit or delete some of the items that you put on your requisition click on **Edit** or **Delete** on the right hand side.

12. Once you have all your items listed on your order click on **Add Requisition Accounts**. Here is where you will enter your account number for the order.

13. Your cursor will appear in the account number box. Enter in the account number that you would like to use and hit enter.

Account Distribution

Available Accounts

Fnd	T	Loc	Obj	Func	Prj	Local	Funds Available	Selected
10	E	112	382	221300	145	000000	\$0.00	<input type="checkbox"/>
10	E	112	382	221300	159	000000	\$0.00	<input type="checkbox"/>
10	E	112	411	110000	000	000000	\$6,084.00	<input checked="" type="checkbox"/>
10	E	112	411	110000	040	000000	\$0.00	<input type="checkbox"/>
10	E	112	411	110000	045	000000	\$1,460.00	<input type="checkbox"/>
10	E	112	411	110000	100	000000	\$0.00	<input type="checkbox"/>
10	E	112	411	121000	000	000000	\$0.00	<input type="checkbox"/>
10	E	112	411	213000	100	000000	\$0.00	<input type="checkbox"/>
10	E	112	411	214000	000	000000	\$350.00	<input type="checkbox"/>
10	E	112	411	221300	145	000000	\$0.00	<input type="checkbox"/>
10	E	112	411	221300	159	000000	\$0.00	<input type="checkbox"/>
10	E	112	411	221400	145	000000	\$0.00	<input type="checkbox"/>
10	E	112	411	221400	159	000000	\$0.00	<input type="checkbox"/>
10	E	112	411	241000	000	000000	\$1,000.00	<input type="checkbox"/>

100 records displayed

Account Number:

Quick Key:

Account Level Description
GENERAL SUPPLIES

Account Number Information

Code	Description
10	GENERAL FUND
112	CONVERSE
411	GENERAL SUPPLIES
110000	UNDIFFERENTIATED CURRICULUM
000	DISTRICTWIDE
000000	DISTRICTWIDE

2015-2016 Available Funds By
Individual Account

Total Amount to Distribute: **\$25.00 100.00%**
Total Distributed: **\$25.00 100.00%**
Amount Remaining: **\$0.00 0.00%**

Selected Accounts

Account Number	Amount	Percent
10E112 411 110000 000 000000	25.00	100.00

14. After hitting enter, that number will be highlighted in the Available Accounts chart. You will need to check the appropriate box.

Available Accounts									
Fnd ▲	T	Loc	Obj	Func	Prj	Local	Funds Available	Selected	
10	E	112	382	221300	145	000000	\$0.00	<input type="checkbox"/>	
10	E	112	382	221300	159	000000	\$0.00	<input type="checkbox"/>	
10	E	112	411	110000	000	000000	\$6,084.00	<input checked="" type="checkbox"/>	

15. You will notice that this account number will show up in the box on the bottom of your screen.

Selected Accounts		
Account Number	Amount	Percent
10E112 411 110000 000 000000	25.00	100.00

16. If that account number is correct and the account distribution is correct go ahead and click Save Account Distrib which is located in the upper right hand portion of your screen. If you would like to distribute your account number between two different account numbers, put your cursor in the percentage/amount boxes and put enter in the amount/percentage you would like to be allocated. Then make sure that you click on what other account number you would like to use, or type in what account number you would like to use. You will want to make sure that once you have finished with your account numbers make

Total Amount to Distribute: **\$327.93 100.00%**
 Total Distributed: **\$327.93 100.00%**
 Amount Remaining: **\$0.00 0.00%**

sure that your distribution is at 100%. (Ex.

17. Review the account numbers you have just entered to ensure everything is correct. If so go ahead and

click on . This will then take you to your screen of requisitions that you have entered that are awaiting approval.

18. If you decide that you are not finished after entering in your account number click on . This will put your requisition into a (WIP) Working in Progress; **it will not go to approval**. This allows for you to come back later and add items, or to edit your account number.

19. To print out your requisition the “Print” button in the top right hand corner .

20. Click on View Report.

If you have any questions, please email or call Lori McConnell at lmccconnell@sdb.k12.wi.us or 361-4115.

Section V

Guidelines & Procedures



School District of Beloit

GUIDELINES REGULATING EXPENSE REIMBURSEMENT

A. General Provisions

1. These expense reimbursement guidelines shall apply to all employees and Board of Education members.
2. Travel expenses shall be reimbursed in accordance with established procedures.
3. Expense forms must be correctly filled out, dated and signed before being submitted to the immediate supervisor and budget manager for approval. All necessary registration forms must be completed and attached. Any agenda or program containing information available on the leave/conference must be attached. Reimbursement for expenses will be made only with approval of the budget manager and immediate supervisor. The Superintendent or designee can deny reimbursement for expense items not meeting established requirements.
4. All employees traveling on official approved business are expected to exercise the same care incurring expenses that a prudent person would exercise if traveling on personal business. Careful planning of all travel is encouraged to take advantage of the lowest possible rates so that District professional development funds can be maximized.

B. Transportation by Common Carrier

1. Air travel shall be limited to coach fare and one checked bag each way. Receipts must be presented to document all expenditures.
2. Individuals driving a personal vehicle shall be reimbursed at the prevailing Internal Revenue Service standard mileage reimbursement rate.
3. Round trip tickets shall be secured whenever practical and economical. Insurance coverage for persons traveling by common carrier is not allowable as reimbursable expenses.

C. Meals

Meal costs are a reimbursable expense and will not be paid by the District unless the employee is traveling overnight or if meals are part of a conference or workshop where the cost is included as part of the registration fee.

Reimbursements for meal costs will be capped based on the current per diem state or out of state rates. The federal rate for meal and incidental expenses (M & IE) is the standard meal allowance as set by the Internal Revenue Service in publication 1542.

D. Lodging

1. The actual lodging expenses, plus Wisconsin room taxes and out-of-state sales tax, shall be allowable at single room rate unless District personnel or Board of Education members are share a room. Itemized receipts for lodging expenses are required.
2. When travel expense vouchers are supported by receipts which show signs of erasures or alteration, the voucher shall be returned to the employee for a statement of facts explaining the reason for the alterations before the travel voucher shall be approved for payment.

E. Registration Fees

1. Enrollment or registration fees for conventions and meetings of associations or organizations are allowable for employees attending as official representatives of the District. If this fee is unusually high, it may be disallowed. Receipts shall be attached. A program, literature or receipts shall be attached showing whether or not meals are included in the registration fee. Corresponding deductions shall be made based on the schedule for separate meals.

F. Miscellaneous Expense Items

It is expected that miscellaneous expenses incidental to official travel shall be held to the minimum amount required for essential and efficient conduct of business. The following rules are established as guides for the traveler and the approving officials and shall not be considered as making all claims for these items allowable without questions.

1. **Taxicab** – Charges are allowable when such travel is necessitated. Receipts, when available, shall be attached to the travel voucher.
2. **Parking Fees** – Reimbursement for parking charges is allowable, including metered parking. Receipts, when available, shall be attached to the travel voucher.
3. **Guest Meals** – the cost of guest meals is allowable only if it can be shown that such cost was essential and necessary to the conduct of official business and approved in advance by the Superintendent of Schools. In no case shall the amount allowed be in excess of the maximum established. Full explanation shall be given on the voucher including the name and position held by the guest and identification of business shall be stated on the voucher. Itemized receipts are required.
4. **Alcoholic Beverages** – Expenditures for alcoholic beverages shall not be allowed as reimbursable items.

Each employee must receive pre-approval from administration or the Board of Education (or the board president) in an emergency situation for any expenses which he/she expects reimbursement.

CROSS REF.: IRS Government Publication 1542, Per Diem Rates

APPROVED: July 26, 1983

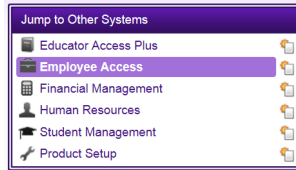
REVISED: January 27, 2009
February 28, 2012
December 18, 2012

REPRINTED: March 28, 2000

REVIEWED: January, 2014

Entering Employee Expense Reimbursement

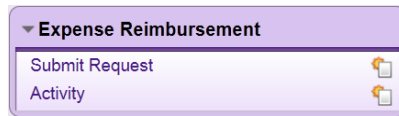
1. Go to School District of Beloit home page. Click on For Staff, click on Essential Links. Click on the link for Skyward Business (Skyport). Log in using your Skyport log in



2. On the right side, click on Employee Access.



3. Click on Expense Reimbursement.



4. Select Submit Request.

5. Select Add. 

6. Complete screen with appropriate information. Be sure to include the name of the conference and the location. Click Save.

7. Add Reimbursement Detail Lines by clicking Add on the middle right side. 

8. Enter or adjust the Date of the Expense. For Reimbursement Type, click on the down arrow for options.

* Reimbursement Type: 

9. Select Expense Type.

```

AIRFARE WITH ONE BAG [AIRFARE]
BREAKFAST IN WI [BRK WI]
BREAKFAST OUT OF WI [BRKOUTWI]
CAR RENTAL & GAS [CAR RNTL]
PER DIEM MEAL RATE IN WI [DAYIN WI]
PER DIEM MEAL RATE OUT OF WI [DAYOUTWI]
DINNER IN WI [DNNR WI]
DINNER OUT OF WI [DNRROUTWI]
GROUND TRANSPORTATION [GRD TRSP]
HOTEL [HOTEL]
LUNCH IN WI [LCH WI]
LUNCH OUT OF WI [LCHOUTWI]
BOOKS; OTHER MATERIALS [MATERIAL]
2014 MILEAGE [MILEAG]
2013 MILEAGE [MILEAGE]

```

10. Complete the screen by adjusting the “Quantity” and entering a “Description”. Tab to the “Account” line and enter the account number to be charged. If a receipt is required, click “Receipt Attached”. Click Save.

Expense Reimbursement Request Detail Maintenance

Expense Reimbursement Information
 Expenses From: 02/06/2014 To: 02/07/2014 2 Days
 Total Reimbursement Amount: \$17.00

Add Expense Reimbursement Detail Line

Line Number: 1 Receipt Attached Direct Bill/Do not Reimburse

* Date: 02/06/2014 Thursday

* Reimbursement Type: DINNER IN WI (DNNR WI)

Category: Meals

DISTRICT'S RATE FOR DINNER IN WI--OVERNIGHT TRAVEL ONLY

Quantity: 1.00
 Amount: \$17.00 (Maximum allowed for this code is \$17.00)
 Total Amount: \$17.00

* Description/Customer: DINNER AT FAMOUS DAVE'S

* Account	Account Selection	Amount	Percent
10E814 342 252000 000 000000 - GENERAL FUND/BUSINESS & OPER/EMPLOYEE TRAVEL/FINANCE		17.00	100.00
Total:		17.00	100.00

11. To attach a receipt, click on Attachments. Click on Add File. At “Type” click on down arrow and select “Attachments (Expense Reimbursements Attachments)”. Add “Description”. Click on Browse... Select the document to be attached. Click Save. In the next screen, click Back.

Expense Reimbursement Request Attachments

Edit Expense Reimbursement Request Attachment

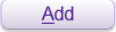
* Type: Attachments (Expense Reimbursement Request)

Entered Date: 02/11/2014
 Entered Time: 11:31 AM
 Entered By: ARDIS A LOHFF

* Description: RECEIPT FOR KALAHARI

* Attached File: sample receipt.pdf
 Change the file that is used for this attachment.

Asterisk (*) denotes a required field

12. If you have more than one Expense Type for the same day/conference, click Add.  Continue until all expenses have been entered. See Hint #1.

Expense Reimbursement Information

Reimbursement For: LOHFF, ARDIS A

Expenses From: 02/06/2014 To: 02/07/2014 2 Days

Purpose for Reimbursement: EXPENSES TO ATTEND SKYWARD CONFERENCE AT KALAHARI--MEALS, MILEAGE, AND HOTEL

Reimbursement payment option: Reimbursement Payment made via AP ACH

Total Reimbursement Amount: \$229.12

Expense Reimbursement Detail Lines

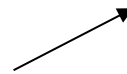
Views: General Filters: *Skyward Default

#	Date	Type	Description/Customer	Quantity	Amount	Total Amount	C	R	D	
1	02/06/2014	DINNER IN WI	DINNER AT FAMOUS DAVE'S	1.0000	17.0000	17.00	M			
2	02/06/2014	HOTEL	HOTEL STAY AT KALAHARI	1.0000	99.0000	99.00	L			
3	02/06/2014	2014 MILEAGE	MILEAGE TO AND FROM WISCONSIN DELLS	202.0000	0.5600	113.12	G			

13. If you need to leave this process before finishing, click Save and Finish Later. If you have completed your expense reimbursement request, click Submit For Approval.

If you have any questions, please email or call Ardis Lohff at alohff@sdb.k12.wi.us or 361-4116.

Hints:



- When adding another expense, at the Add screen you can choose Clone. Make the changes for the new expense; you won't need to reenter the account number. Then click Save.

Fixed Asset Guidelines

Technology Fixed Assets:

1. All technology items must be purchased thru the Technology Department via SDB website – Technology Purchase Request
2. Technology will enter a requisition for the items to be ordered or will place the order via the Technology Procurement Card
3. Individual items that need to be tagged for fixed asset purposes:
 - a. iPads
 - b. Laptops
 - c. Computer

All other district Fixed Asset purchases:

4. All items over \$2,500 are tagged and entered into Skyward financial software for tracking purposes (not depreciable)
5. All individual items and grouped orders exceeding \$5,000 are tagged (is possible) and entered into Skyward financial software and will be capitalized using the straight line depreciation method
6. Finance Office will distribute asset tags to all staff.
 - a. Technology staff must bring a copy of the receipt/invoice to the Finance Office in order to receive asset tags. Finance Office will make a copy of the receipt/invoice to follow up with staff if we have not received the asset tag, serial number and location within a reasonable time frame.
 - b. When other departments order equipment that need to have a fixed asset tag, the Finance Office will send tag and fixed asset documentation to the building secretary. Secretary will need to locate equipment in their building and tag equipment with the SDB Tag. The building secretary is responsible for completely filling out fixed asset form and sending back to the Finance Office as soon as possible.
7. Monthly the finance office will run a Skyward detailed report of all equipment purchases to ensure that we have asset tags to account for all equipment

Accounting Notes:

All items less than \$2,500 should be object 449

Items more than \$2,500 but less than \$5,000 should be object 551

Items more than \$5,000 should be object 553

Technology hardware over \$5,000 should be object 581

Technology software over \$5,000 should be object 582

CASH HANDLING PROCEDURES

ALL MONIES MUST BE DEPOSITED INTACT (student fees, extra-curricular admissions, field trip, fund raising, etc)

- a. Monies must be counted before giving to the person responsible for making the deposit.
- b. All monies received must be counted and verified. Whenever feasible money should be counted in the presence of the staff member turning in the funds. Receipts must be issued for the funds received either a printed Skyward receipt or a written receipt from a bound pre-numbered receipt book.
- c. Checks must be stamped for endorsement at time of receipt by depositor.
- d. Depositor must use appropriate security measures (locked cash boxes, files, safes and vaults) to safeguard monies until deposited. Staff members should not be holding monies in their classrooms or offices. Funds received by staff should be submitted for deposit upon receipt.

When to deposit: (According to Board Policy 664)

All monies collected by district employees or student treasurers are considered district funds. Employees, volunteers or student treasurers must hand deliver money directly to the building secretary/bookkeeper and shall provide a breakdown of source of funds and person(s) collected from and must be substantiated with documentation such as pre numbered receipts, the number of tickets or items sold. The monies shall be dually counted after collection and then recounted for verification and shall be receipted and promptly deposited in designated district depositories.

Monies shall be managed in a prudent manner to insure their security. Therefore, the monies collected shall be deposited on a daily basis in accordance with established procedures. If a fund raising event is held during non office hours, the monies will be deposited in a night deposit box at a designated district depository or will be secured in a district safe until the next business day when it shall be deposited. In no case, shall monies be brought home with an employee, volunteer or student treasurer, or be stored in an unsecure place such as a desk or file.

Deposit Process:

- a. Make a copy of checks deposited
- b. Run Skyward reports including receipt totals and fees paid
- c. Run adding machine tape of written receipts for deposit period
- d. Reconcile reports to monies on hand, noting any differences
- e. Need two receipts from Bank – the pink copy of deposit slip with receipt amount, date, and time printed on it to send with transmittal and the regular receipt for your deposit records
- f. Transporting of deposits to the Bank is the responsibility of ABM.

Daily Transmittals must include -

- a. Transmittal form with receipts recorded to the appropriate account numbers. **One deposit slip should be used per day.**
- b. Copy of checks deposited and Skyward fees paid report
- c. Pink copies of deposit slip with the receipt stamped on it from the Bank
- d. Transmittal form (and all attachments) should be sent to the Finance office no later than the day following the bank deposit date.

DO'S

1. Deposit **all** funds intact.
2. Do keep the receipt book and deposit records accessible to other designated staff to use when absent from the office. The principal needs to know where these records are kept to insure that other staff can issue receipts and follow cash handling procedures when you are away from the office.
3. Do have two employees empty vending machines.
4. Do report any theft or loss to the Director of Finance immediately.

5. Do remind staff to keep money out of classrooms.
6. Do keep change funds separate from money to be deposited.

DON'TS

1. Don't cash personal checks for staff or use district funds for personal loans (IOU's).
2. Don't hold checks until a certain date before depositing.
3. Don't hold or accept non-District funds such as PTA/PTO or Booster Club monies, do not accept responsibility for monies from an independent entity.
4. Don't accept funds that aren't counted first.
5. **Don't make purchases using cash, all cash must be deposited.**

VENDOR GUIDELINES

Amazon

Use the business.amazon.com site to log in. The District is set up for Prime Benefits (free 2 day shipping for prime items). Also please be sure to go to Amazon Smiles and set up your supported organization as School District of Beloit. Contact the Business Office if you need to be set up as a new user.

Nasco

The following page is the information from Nasco for discounts on their 2019-20 catalog prices. **You must use the quote number on your purchase order in order to receive the discount and the free shipping** (on most items). There is also a minimum order amount of \$50.00 to receive the discount.

Office Depot

Use the business.officedepot.com/ site to log in and the District Office Depot account number is 90746778. Contact Jenny Miller at jmiller@sdb.k12.wi.us if you need to be set up as a new user.

Sam's Club

Every school has a district Sam's Club card. All orders from Sam's Club should be done with this membership to ensure tax exempt status. As a reminder online ordering with this membership account is not permitted.

Staples

When using Staples Advantage there are District discounts on purchases. Use the staplesadvantage.com site to log in and the District Staples Advantage account number is 1842222.

WalMart

When ordering from Walmart.com please be sure you are not charged tax. If you are, please contact the Business Office to have your email address added to the District tax exempt account.

Catalog Discount For:
Beloit School District

Nasco Quote Number: 45588
Valid: 1/1/2020 – 12/31/2020

<u>Nasco Catalogs:</u>	<u>Discount Off Unit Price:</u>
Art Education	20%
PreK-5 Education	15%
Math	15%
Science	15%
Family & Consumer Sciences	10%
Physical & Health Education	15%
Agricultural Education	10%

\$99.00 minimum order requirement after discount is applied to receive free shipping*

TERMS: Net 30 days, with approved credit

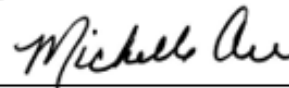
DELIVERY: Approximately 5-7 business days upon receipt of order

FREE SHIPPING: Nasco pays ground shipping to school facilities except for live material ("LM" prefix), or items with a truck logo (🚚). Truck shipments are dock delivery, Call 1-800-558-9595 for answers to your shipping questions.

PLEASE NOTE:

- An additional small order handling fee will be applied to orders less than \$50.00.
- A hazardous material surcharge will be added to items with a black diamond (◆) or D.O.T. symbol.
- Discounts are off current unit price. Qualifying orders will automatically receive the quantity price if lower than the discounted unit price.
- Discounts not valid with any other coupons, offers, sale flyers, or website promotions.
- Ready-or-Not Tot® and accessories, STEM 101 Kits, NICERC Kits, *Xenopus* frogs, live material coupon cards, ALEX mannequins and accessories, and items with a "NA", "NZ", or "KI" prefix are not discounted.
- For live material order requirements, please visit <https://www.enasco.com/shipping#live-material>.
- Catalogs are mailed annually to teachers upon publication, or visit us at www.eNasco.com to browse our complete product offering.
- For instructions on how to use your quote online, please visit <https://www.enasco.com/how-to-use-my-quote-number>
- All other catalog terms apply. |
- Please include quote number on all orders.

Visit our website at www.eNasco.com/K-CareerSolutions for College & Career Readiness solutions, including CTE, STEM, STEAM and SEL options.



Michelle Au, Contract Sales Supervisor

*Hawaii and Alaska not included. Please call 1-800-558-9595 for shipping rates.

Paper Ordering Information

Please follow these directions for ordering paper:

1. Go to: <http://www.goofficepro.com>
2. On the left side click: "Visit Our Online Order Center".
3. On the left side, Login. If you do not have a login, please call 608-531-6001 or email csr@goofficepro.com to request one and include your name, school, and title.
4. Across the top, click "My Lists".
5. Right beneath the link for "My Lists", click "Company Lists".
6. From the "Select List" pull-down on the left side, select "School Paper".
7. If you would like a color or another item not on our pre-selected shortcut list, please feel free to do a "Search" for any item or paper color on their website.

The district put out a state-wide RFP asking for vendors to bid on Just In Time paper delivery to every location. We selected the vender with these qualifications:

1. Local supplier.
2. Online ordering.
3. Accepts Procurement Cards.
4. Delivers to schools without loading docks.
5. Lowest combined total price for Paper, Card Stock, Construction, in all colors.

GoOfficePro won the bidding and was selected by our School Board to be our district supplier.

You no longer need to stock a year's worth of construction paper in your schools; you can have delivery in amounts as needed each week.

PURCHASING

The Board of Education authorizes the Executive Director of Business Services or designee to supervise the purchasing of all materials, goods, services, equipment and supplies for the district in accordance with state law and policy guidelines.

All purchases shall be made at the best price available giving consideration to quality, conformity to developed specifications and suitability to the requirements of the educational system and delivery terms.

1. General Guidelines

- A. All purchases of materials, goods, services, equipment, and supplies for which the district will be responsible for payment must be made in accordance with established purchasing procedures and policies which may include payment approval through the use of purchase orders, procurement cards, eznetpay, consultant agreement, direct pay forms and petty cash checks.
- B. Given equality of service, quality, delivery and price, the district shall purchase, wherever possible, from local suppliers and services. The purchasing agent shall not feel bound to purchase any item locally that can be secured at a savings from outside services.
- C. Purchases involving monies raised by solicitation and/or sales shall be from district supplies and services whenever possible.
- D. Use of "Resale" account within the district budget shall not be used as competition for area businesses.

2. Failure to Adhere to Purchasing Policies

Staff who purchase materials, goods, services, equipment and supplies, without following established purchasing guidelines will be held accountable for payment of said items. Continued failure to follow purchasing guidelines will subject the staff to discipline up to and including termination.

LEGAL REF.: s.s. 120.13(5) and (33)
120.44

CROSS REF.: 623 Budget Implementation
662.2 Petty Cash Accounts
672.1 Purchasing/Bidding Requirements
672.2 Local Purchasing
672.4 Vendor Relations
673 Payment Procedures
740 Materials Resource Management (Central Storeroom)

APPROVED: December 18, 1980

REVISED: March 28, 2000
February 26, 2013
July 23, 2013

REPRINT: July 22, 2003

PURCHASING/BIDDING REQUIREMENTS

The purchase of materials, equipment, and services shall be made pursuant to procedures appropriate to the dollar value of the purchase.

It is the policy of the Board of Education that the district administrator follows the following general provisions except in cases of emergency. If an emergency exists, the district administrator may purchase in accordance with Policy 674 Emergency Procurement and Expenditure Authority without bidding or soliciting quotes for an immediate need.

A. General Provisions

1. All orders or contracts based on bids shall be awarded to the lowest responsible bidder in terms of quality, conformity to specification, suitability for intended use, delivery terms and service requirements. Special preference may be given to qualified local area bidders in the awarding of orders or contracts based on bids. The Board reserves the right to reject any and all bids and to approve the bid or quotation which is in the best interest of the School District of Beloit.
2. For the purposes of Policy 672.1, the dollar level requirements apply to purchasing decisions made for products or services individually or in aggregate. (For example, the purchase of 10 tables at \$101 each exceeds the \$1,000 threshold.)
3. The Board of Education authorizes the Superintendent, Executive Directors and Directors to execute contracts, agreements, leases, and any other contracts that create financial obligations up to \$15,000.
4. The Board of Education authorizes the Superintendent and the Executive Directors to execute contracts, agreements, leases, and any other contracts that create financial obligations up to \$25,000. When the purchase of, and contract for, single items of supplies, materials, or equipment amounts to \$25,000 or more, competitive bids shall be obtained unless they are sole source purchases. The Board shall be informed of the terms and conditions of all competitive bids and consequences of such bids. Financial commitments over \$25,000 in a single purchase require authorization by the Board of Education.
5. Administration will make the Finance, Transportation and Property Committee aware of purchases made in the dollar amounts of \$15,000 to \$25,000.
6. Sole Source Purchases are defined as those products or services that are available from a single vendor, are a part of an existing system, or are based upon historical research/experience and do not lend themselves to changing suppliers.
7. All leases qualifying for "tax exempt" status must also be approved by the Executive Director of Business Services. Tax exempt leases are considered debt and must be incorporated in the statutory debt limitation formula.

B. Threshold Requirements

1. Purchases to \$3,000
 - It shall be the responsibility of the budget manager to use good judgment and prudent business procedures in making purchases.
 - Purchases under \$3,000 may be implemented in the most inexpensive and effective procedure available to the purchaser.

2. Purchases \$3,000 to \$5,000
 - Consideration shall be given to:
 - i. Cost
 - ii. Vendor's ability to fulfill the contract
 - iii. Delivery
 - iv. Payment Terms
 - v. Design
 - vi. Compatibility with existing district inventory
 - vii. Previous relationship with the vendor
 - viii. Product quality
 - ix. General suitability for safe use within the school district
 - Requires issuance of a purchase order or business office prior approval or business office approved Service Provider/Consultant Contract.
 - It shall be the responsibility of the budget manager to use good judgment and prudent business procedures in making purchases.
 - Purchases under \$5,000 may be implemented in the most inexpensive and effective procedure available to the purchaser.
 - In the case of sole source purchases, a written explanation must be maintained by the budget manager in lieu of three written quotations.
3. Purchases \$5,001 to \$14,999
 - Requires the approval of a Director or Executive Director.
 - Requires a minimum of three written quotations to be retained by the budget manager for three years.
 - In the case of sole source purchases, a written explanation must be maintained in lieu of three written quotations.
4. Purchases \$15,000 to \$25,000
 - Requires the approval of the Executive Director of Business Services, or Superintendent prior to purchase.
 - Requires a minimum of three written quotations to be retained by the budget manager for three years.
 - In the case of sole source purchases, a written explanation must be maintained in lieu of three written quotations.
 - Notify Finance, Transportation and Property Committee of purchases between \$15,000 and \$25,000
5. Purchases \$25,001 and greater
 - Requires the approval of the Board of Education prior to purchase
 - Requires the solicitation of three or more bids
 - In the case of a sole source purchase decision, a written explanation must be kept on file for a minimum of three years.
 - Requires issuance of a purchase order or business office approved Service Provider/Consultant Contract.

6. All district contracts for the performance of labor or furnishing the materials for a public improvement or public works project shall meet the protection and guarantees in accordance with School Board policy, state law and established rules and regulations. These requirements do not apply to a contract for the direct purchase of materials by the District.
7. If you are going to receive services from an individual a business office approved Service Provider/Consultant Contract is required for those providers receiving a payment of \$1,000 or more per occurrence.
8. The issuance of a purchase order is required in all cases for documentation unless you use a procurement card where itemized charge receipts will be kept and a digital record will be maintained of purchase event history through the online procurement card software.
9. Administration shall not require a purchase order to be issued for the following items:
 - Reoccurring regular purchases such as cleaning supplies, paper, technology replacement and educational items such as textbooks and workbooks.
 - Professional services such as attorneys and architects.
 - Replacement parts or maintenance contracts for existing equipment or mechanical systems.
 - Cooperative Educational Services Agency (CESA) services utilized by the District.
 - Professional Services. Such services shall be selected through an interview process.
10. Consideration will be given to:
 - Cooperative purchasing with other governmental agencies when consistent with district policies. Cooperative Educational Service Agency (CESA) services utilized by the district will not require written bids.
 - Services required to be furnished to employees as a result of an employment agreement approved by the Board.
 - Maintenance costs, replacement costs and trade-in values shall be considered when determining the most economical purchase price.

LEGAL REF.: s.s. 62.15
779.14

CROSS REF.: 652 Revenues from Investments
672.5 Protections and Guarantees for Construction and Renovation Projects
684 Audits

APPROVED: December 18, 1980

REVISED: July 23, 2013
August 27, 2013
February 24, 2015

REPRINTED: March 28, 2000

PURCHASE, SALE AND DISPOSAL OF ASSETS

The Superintendent or designee is authorized to purchase assets and dispose of non-usable or obsolete assets. Assets are defined as property that is 1) valued at more than \$500.00; 2) has an asset tag assigned to it; or 3) mobile devices. The purchase of assets costing more than \$2,500 or *technology capital assets such as computer, monitors, mobile devices, etc.* must be reported to the Business Office on the prescribed form for assignment of an asset tag. All proceeds from sales/disposals shall be remitted to the Business Office and be deposited in the appropriate Fund. All disposals of assets must be reported to the Business Office on the prescribed form to provide for removal from the Capital Asset inventory system. This reporting requirement includes assets that are lost, stolen, or destroyed while within the care of the employee.

The key criteria governing the disposal of assets are 1) efficient sharing of assets within the district, and 2) a visible and “arms length” sale / distribution.

Assets shall be disposed of in the following sequence:

1. Items determined to be in good working condition by the Directors of Facility Services or Technology Services will be first made available within the District.
2. Items will be offered in an appropriate manner, balancing the costs associated with the type of disposal, and aligning the methods of disposal with the value and type of items to be disposed. Offers to the public may (but are not required to) include:
 - Auction Services
 - Direct solicitation to potential buyers.
 - Donations to not for profit entities, preference to be given to community not for profit entities which are willing to pick up the disposed assets.
 - Solicitation to other educational institutions for sale, in trade or as a donation.
3. Items that are not sold or disposed of after reasonable/appropriate efforts will be recycled or destroyed.
4. The Assistant Superintendent of Instruction should be contacted for the disposal of curricular materials.

In accordance with approved EPA and state regulations, the District will recycle technology assets (i.e. computers, monitors, printers, etc.) that it needs to dispose of which are no longer in use. Depending on final count and the quality of assets being recycled, the District can receive payment for these used assets. The District will contract with an E-Cycle vendor that will accept responsibility under approved EPA and state regulations with regard to hazardous materials as well as assuming responsibility for sanitizing all data contained in the recycled products memory, hard drives, or other storage devices. Letters of destruction will be received and maintained on file.

LEGAL REF.: s.s. 120.10(12)
120.44

APPROVED: May 25, 1982

REVISED: June 28, 2005
October 25, 2011
November 27, 2012

REPRINTED: March 28, 2000

REVIEWED: January, 2014

EQUIPMENT AND FURNITURE

All orders or contracts based on bids shall be awarded to responsible bidders in terms of overall cost, quality, conformity to specifications, suitability for intended use, delivery terms and service requirements. Special preference may be given to qualified local area bidders in the awarding of orders or contracts based on bids. The Board reserves the right to reject any and all bids and to approve the bid or quotation which is in the best interest of the School District of Beloit.

Equipment and furniture lists shall be prepared for each construction project by the administration. These lists will be utilized by the Executive Director of Business Services to secure bids, where practicable, and to be available to representatives of appropriate vendors.

CROSS REF.: 672.1 Bidding Requirements

APPROVED: December 18, 1980

REVISED: July 23, 1991
April 24, 2012

Facility Improvement Requests

In order to remain committed to building maintenance and maintain a balanced budget, the Facilities Department must review all facility requests and seek approval for facility projects from the Executive Director of Business Services.

Please submit your requests for facility improvements for review and approval to the Facilities Director. This important step establishes and maintains consistency with product quality; ensures safety and compliance with codes, integration with our facility master plan and to obtain the best pricing for the School District of Beloit.

Whenever you are affecting a facility by attaching something to it or removing an item attached to the structure please seek prior approval. In addition, radios must be approved by facility services. An email, facility work order and/or phone call before submitting your purchase request is advised.

Examples include but are not limited to the following:

- Signs/Decals
- Blinds/Screens
- All facility construction / remodeling requests
- Furniture reconfiguration
- Flooring replacement
- Paint requests
- Classroom reconfigure
- Exterior projects
- Walkie - Talkie / Radios
- Security / Cameras
- Access Control
- Electrical
- Plumbing
- White / Bulletin Boards
- Door / Window Replacement
- Landscaping
- Interior / Exterior Lighting

Our goal is to provide the cleanest, safest facilities for the students, staff and public that utilize them. Thank you for your cooperation!

Entering a School Dude Service Request for Maintenance and Facilities Work Orders

We are now using SchoolDude to submit maintenance and facilities work orders.

Step 1: Register as a user at the following link:

<https://www.myschoolbuilding.com/myschoolbuilding/mygateway.asp?acctnum=1607789568>

- When you register, the account number will already be populated for you. Enter your name, phone number, email address and create a password.

Step 2: Submit a work order request

- Once you submit your first work order request, you will automatically be set up in MaintenanceDirect with an account.

IMPORTANT: You need to actually submit your 1st work order to be set up as a user as this completes the registration process.

Listed below are tutorials to help you register and log in to your account and submit requests

- How to Login/Register:

<http://help.dudesolutions.com/Content/Documentation/Maintenance/MaintenanceDirect/User%20Roles/Requester/How%20to%20Register%20Log%20in.htm>

- How to Submit a Request:

<http://help.dudesolutions.com/Content/Documentation/Maintenance/MaintenanceDirect/User%20Roles/Requester/How%20to%20Submit%20a%20Work%20Request.htm>

GUIDELINES FOR ADVERTISING THROUGH TECHNOLOGY

The use of District and school websites shall support the District's vision and goals and shall be coordinated with other District communication strategies.

The purpose of this policy is to define conditions upon which advertising that promote products or services to students, staff, parents, and the community may be placed on District and school websites.

It shall be the responsibility of the Superintendent or designee to ensure that all website advertising adhere to the principles set forth in this policy. Advertising samples may be requested for pre-approval by the Superintendent or designee. Final discretion to allow marginally questionable advertisements rests with the Board of Education.

All advertising agreements shall be in writing and shall specify all relevant terms, including pre-payment and no payment penalties. The Superintendent shall set up advertising agreements and procedures for approval of website advertising and sponsorships in the District. Funds generated from advertising will be accounted for, handled and reported in compliance with Wisconsin Uniform Financial Accounting Requirements.

All advertising must be consistent with District and school curriculum and academic goals.

Advertising must be tasteful and not minimize or take away from the role of the web content.

Inclusion of advertising does not constitute approval and/or endorsement of any product, service, organization, or activity.

All advertising must be consistent with the District's policies prohibiting discrimination on the basis of race, color, national origin, religion, sex, handicap, age or sexual orientation and, must be age appropriate for the students who may be involved. The District will not permit advertising that:

1. Promotes the use of illicit drugs, alcohol, tobacco, or firearms
2. Promotes hostility, disorder, violence, sexual activity or gambling
3. Attacks or demeans any ethnic, racial, or religious group
4. Promotes any specific religion
5. Inhibits the functioning of any school or school sponsored activity
6. Requests personally identifiable data
7. Requires an exclusive rights contract unless approved by the Board
8. Promotes or opposes a political cause, political party, political candidate, political organization or politically controversial issue.

Placement of commercial messages or advertisements on websites shall require specific authorization from the Superintendent or designee. The School District of Beloit reserves the right to decline the hosting of any ad at any time.

Nothing in this policy shall be interpreted to prohibit or require authorization for public service announcements or events directly related to services of the School District of Beloit.

Ads may not:

1. Automatically redirect a user to a different browser window prior to clicking on the ad
2. Link to spyware, malware, or the collection of data which intrudes on any users privacy rights
3. Be redirected to change its content after ad approval
4. Cause an automatic pop-up of a second window of any type prior to clicking on the ad
5. Interfere with the closing of any web page
6. Resize itself within the page on which it's being displayed so as to alter the original size or placement of the content being served by the School District of Beloit

Advertising rights may be updated at the beginning of each fiscal year and may vary based upon page placement. Each advertiser must have a signed agreement with the School District of Beloit or designated ad service agency before any ad will be placed on a website.

LEGAL REF.: s.s. 118.12
118.125
120.44 (2)

CROSS REF.: 850 Public Solicitation/Promotions in the Schools Regulations
374 Student Fundraising Activities
368 Rule 1 dc Guidelines for Responsible Use
522.4 Staff Code of Ethics

APPROVED: March 27, 2012

GUIDELINES REGARDING STUDENT FEES/FINES/CHARGES

A. Student Fees/Fines/Charges

1. Student Fees

- a. A student fee schedule is in effect for students in grades EC-12. The schedule is as follows:
 - Part Time Student \$10.00 includes student ID
 - Grades EC – 3 \$25.00 includes student ID
 - Grades 4 – 8 \$35.00 includes student ID
 - Grades 9 – 12 \$38.00 includes student ID
- b. Student Fees are pro-rated for the student who transfers into the School District of Beloit and enrolls in a school after the opening of the school year as follows:
 - 1st Quarter – Full payment 3rd Quarter – 50% payment
 - 2nd Quarter – 75% payment
 - 4th Quarter – 25% payment
- c. A refund of student fees is paid to the student who withdraws from the School District of Beloit and does not enroll in another Beloit school before the close of the school year as follows:
 - 1st Quarter – 75% refund
 - 3rd Quarter – no refund
 - 2nd Quarter – 50% refund
 - 4th Quarter – no refund

2. Resale Fees

In certain courses such as art, career technical education and family and consumer economics, students may be required to pay resale fees. Resale fees are a charge made to a student that recovers in a full the cost of an item we are providing for the student's education necessary for facilitating the student's learning experiences should they choose to purchase it. This fee covers such items as construction projects, food used and/or consumed during foods labs, etc. Unspecified student payments must be applied to student fees before being applied to resale fee accounts.

The district will provide Personal Protective Equipment (PPE) as required for student safety. Safety glasses are an example of PPE.

Unspecified student payments must be applied to student fees before being applied to resale fee accounts.

3. Physical Education

In the secondary physical education program (Grades 4-12); students must supply their own uniforms and shoes. Certain activities such as bowling and skiing require fees for such activities. Locks for student lockers are purchased from the school to ensure the security of a student's personal belongings. The lock or replacement lock fee is \$5.00.

4. Music

In the instrumental music program, students shall rent to purchase an instrument. Students are not required to purchase an instrument that is considered expensive and "special". Students using district musical instruments will be assessed a rental fee of \$50.00 per school year. Students, who demonstrate financial hardship may, request a waiver of the fee form the building principal.

Students who rent more than one instrument will not be assessed more than one instrument fee per year. Students/guardians are liable for instrument repair/loss if beyond normal wear/use. Student fees may not exceed the related costs during the year of the fee assessments.

5. Student Parking (Memorial High School)

A \$100.00 fee per year (discounted to \$50.00 during the second semester), is charged to those Memorial High School students obtaining a parking sticker allowing them to park in the high school parking lot. Parking stickers are not transferable, and are void without refund if student withdraws or graduates during the school year.

6. Transcripts

Transcripts are provided free of charge to all students currently enrolled in the school district. There is a \$5.00 per transcript charge for students who have graduated or no longer attend the school district.

7. Replacement Badge and Lanyards

Students are provided one badge and lanyard at the start of the school year. A replacement fee for lost or damaged badges (\$5.00) will be assessed.

8. Technology Equipment or Supplies Fees

Technology equipment or supplies are school owned property. If district equipment or supplies are damaged, lost or stolen, a fee or fine will be assessed. The charge will be reasonable, seeking only to compensate the district for the expense or loss incurred. This fee will be put into the student's fee management account and collection shall be prior to the end of the school year that the technology equipment or supplies were repaired or replaced.

9. Co-curricular and Extra Curricular Fees

a. Co-curricular activities are those activities outside of the school day that are required and graded as a part of a course. Examples include DECA and marching band.

- No participation fee

b. Extra-curricular activities are those activities outside of the school day that are enrichment and supportive of the educational experience. Examples include jazz band, Latin club, and athletic team managers. If no district funds are provided for the activity, no activity participation fee will be collected from the participant. Student fees may not exceed actual district costs. A fee must be supported by evidence that each student receives value of an equal or greater value than the fee.

- Each intermediate school activity \$20.00
- Each high school activity \$25.00
- There is a limit of two activity fees per student per year.
- There is a limit of six intermediate school activity fees per family per year.
- There is a limit of six high school activity fees per family per year.

c. Athletic activities are those athletic programs conducted outside of the school day.

- Each sport/team \$42.00
- There is a limit of two athletic fees per student per year.
- There is a limit of six intermediate school athletic fees per family per year.
- There is a limit of six high school athletic fees per family per year.

All students who fail to turn in, lose or damage uniforms and/or equipment, will be charged for the replacement. The fine will be entered into the student's fee management account. Students may not participate in another sport until this fee has been satisfied.

10. Other Charges

a. In athletic and intramural programs, students are required to provide equipment, which may

be utilized in extracurricular activities. Examples include: golf clubs and shoes, tennis rackets, baseball gloves and shoes, ice skates, basketball and football shoes, swimming practice suits, etc.

b. Students may be requested to pay the price of admission for tickets for special field trips and transportation.

c. Students will be charged the actual costs for books that they lose or damage and the money will be deposited in the General Fund.

d. Other costs may be incurred by students for the optional purchase of yearbooks, student and activity passes.

e. Students who receive Alcohol and Other Drug Education classes are required to pay a course fee prior to the start of the first class.

f. Any course that is credited for graduation, even if it is not required for graduation must be provided without charge. However, the school may assess a fee for the specific course materials such as books (not to exceed the actual cost), but it may not charge for instructional time, such as teacher salaries, apparatus, building costs or maintenance.

B. Collection of Fees

The following guidelines apply to the collection of student fees for:

1. The procedure for collection of instructional fees within each school will be the responsibility of the building principal and his/her designees. Building principals are expected to notify staff, the students and their parents/guardians at the beginning of each school year of the fee collection and waiver policy and procedure. In addition, information regarding fee collection and fee waiver policy and procedure is included in the enrollment information provided to new students and their parent/guardians and in information about the availability of free student meals. Any written notification or registration form relative to items on the student fee schedule must include an opportunity to claim a fee waiver under this policy.

2. Parents/guardians may pay fees for all students in a given school by sending one check. It is recommended that the names of the students and their teachers be written on the check to facilitate record keeping at the school level. Fee collections will be applied retroactively (oldest fees first and will be applied to student fees/fines/charges (No Resale) before being applied to activity).

3. Donations for student fees scholarships may be given and are appreciated.

4. Checks should be made payable to the School District of Beloit.

5. Receipts must be given for fees collected. Schools shall utilize the receipt generating function available within the student software package and/or the parent or guardian may access an online receipt through the student software package family access.

6. Fees collected each day will be deposited in the bank or secured in a safe. No money shall remain in the schools during the evening or weekend hours.

7. Student fees may not exceed actual district cost.

8. Students will not be denied participation in education programs for failure to pay fees. Schedules, report cards or diplomas may not be withheld for non-payment of fees. According to section 118.125 of the statutes and the federal Family Educational Rights and Privacy Act, student records must be made available to an adult student or the parent/guardians of a minor student upon request.

9. A student may no longer be able to participate in the activity for which the payment of charges is necessary until such time as the payment has been made.

10. Student fees for the school year are due by September 30th. The building principal shall notify parents/guardians by the fourth Monday of September, either by telephone or letter, that unpaid fees are due by September 30th. Principals shall continue to send notifications as

appropriate. It is the Board of Education's expectation that reasonable effort is made to collect any and all fees.

11. An automatic waiver of fees may be granted to students for current year fees which are listed on the student fee schedule who are eligible based on economic status through the collection of a household income form under federal guidelines if the fee waiver form is signed by the parents/guardians. A student who has paid these fees and later is determined to be eligible for a fee waiver based on economic status through the collection of a household income form may be given a refund credit of the full amount of fee(s) paid that should have been waived and will be applied to future charges. For current year fees, the Principal may approve a full refund of the fee paid that should have been waived.

12. Current year athletic fees must be waived or paid in full before a student is issued a uniform or permitted to play/scrimmage/participate in the sport. The principal may grant a fee waiver for current year fees on the student fee schedule for students who, in the judgment of the principal, are not able to pay the fee and who have not applied for, or been approved for a fee waiver, based on economic status through the collection of a household income form. Examples include inability to pay due to a homeless situation or a recent job loss or divorce.

a. Prior Year Fees – Unpaid student fees accumulate from one year to another. Attempts will continue to be made to collect fees throughout the student's elementary career. Unpaid fees accumulate and follow the student into high school. If the level of unpaid fees reaches \$1,000 per family, the district retains the option of seeking payment through small claims court or through a collection agency. Upon parent/guardian request, the school may establish a payment plan for prior year fees. High school students in their senior year who are identified as McKinney-Vento or are an unaccompanied youth shall have any unpaid accumulated school fees waived based on economic status through the collection of a household income form under federal guidelines if the fee waiver form is signed by the parents/guardians or unaccompanied youth.

LEGAL REF.: s.s. 118.01

118.125

120.10(15)

120.12(11)

120.13(5)

120.44

APPROVED: March 23, 1982

REVISED: December 16, 2014

September 22, 2015

February 28, 2017

Newsletter Highlight Ideas regarding Student Fees:

- A 100% waiver of general school fees and athletic or co-curricular current year fees is granted to students who are eligible for low income status by completing a household income form and the fee waiver consent form.
- A student, who loses, defaces or destroys any textbook, equipment or other District property shall be required to pay the full replacement cost of such loss or damage. Students who fail to turn in, lose or damage uniforms and/or equipment, will be charged for the replacement. Students may not participate in another sport until this fee has been satisfied.
- Student Parking Fee (BMHS) - \$100 per year (discounted to \$50 during the second semester)
- Fee collections will be applied retroactively (oldest fees first and will be applied to student fees/fines/charges before being applied to activity fees).
- Current year athletic fees must be paid in full before a student is issued a uniform or permitted to play/scrimmage/participate in the sport.
- Prior Year Fees accumulate from one year to another. Attempts will continue to be made to collect fees through the student's career. Unpaid fees accumulate and follow the student into middle school and high school. The student is not permitted to participate in any secondary co-curricular activity until fees are paid, a payment plan is established or the fees are waived or reduced. High school seniors with unpaid fees will not be allowed to participate in graduation ceremonies and will not be granted senior privileges. Once the level of unpaid fees reaches \$1,000 per family the District retains the option of seeking payment through small claims court or through a collection agency.

Incentive and Appreciation Guidelines

It is important that incentives are available to students for meeting educational goals such as regularly attending school. Likewise, it is important that employees feel valued.

The following guidelines are presented as a reference because incentives and employee appreciation tokens need to be reasonable and nominal such as:

- Stickers
- Bookmarks
- Activity books
- Games
- Plaques of appreciation
- Handwritten note or card

Examples of incentives and employee appreciation or employee incentives that the District would like to avoid due to potential problems are listed below:

1. Providing students with a gift card, including e-gift cards, due to loss of accountability. Gift cards, like cash can be used by anyone. It cannot be guaranteed that it will be used for the child. For example, a gift card may be slipped into a purse and forgotten, or it may be used for a purpose other than for the child.
2. Providing gift cards for staff recognition due to the loss of accountability. A culture of recognition is important but a recognition gesture can be made without use of taxpayer dollars such as kudos during a staff meeting or a congratulatory email.
3. It is never allowable to distribute cash due to the loss of accountability.
4. Providing students with unhealthy snacks such as candy and gum. Please refer to the Board Wellness Policy 761. The District's goal is to positively influence students' eating behaviors. Similarly, food and/or physical activity is not to be used as a reward or punishment

Please contact Wendy LaPointe, Director of Finance, with questions at 361-4015 or wlapointe@sdb.k12.wi.us.

Section VI

Forms



School District of Beloit

SCHOOL DISTRICT OF BELOIT

TRAVEL RECORD

This form should be completed on a monthly basis to document days and mileage for travel within district buildings. The distance mileage chart on the back of this form MUST be used to calculate reimbursement mileage between district buildings.

Total your mileage at the bottom and multiply by the current reimbursement rate. Please sign the form, obtain your supervisor's signature and indicate the account number to charge if different from the standard district account. Completed forms should be attached to the Skyward reimbursement request.

Name: _____ Location: _____

Position: _____ Mileage Period _____ to _____

Date	Leaving From	Arriving To	Mileage

Total Miles _____ x _____ per mile = _____

Account Number: 10E000 342 264800 000 000000

The above information is accurate to the best of my knowledge.

Staff Member Signature

Supervisor's Signature

SCHOOL DISTRICT OF BELOIT

MILEAGE CHART - REVISED 9/9/2019

		Arriving To												
		Aldrich	BLA	Converse	Cunningham	Fruzen	Gaston	Hackett	Kolak	McNeel	Memorial	Merrill	Robinson	Todd
Leaving From	Aldrich		2.2	4.2	4.5	2.5	4.1	3.5	2.5	5.3	2.7	1.6	0.4	2.7
	BLA	2.2		2.6	1.9	2	2	1.4	1.5	3.2	1.1	1.1	2.1	0.6
	Converse	4.2	2.6		0.9	4.6	1.3	1.9	2	0.8	1.8	3.1	3.9	3.6
	Cunningham	4.5	1.9	0.9		3.8	0.6	1.2	2	1.2	1.6	3.1	4	3.1
	Fruzen	2.5	2	4.6	3.8		4	3.4	3.9	5.2	3.1	2.7	2.5	1.7
	Gaston	4.1	2	1.3	0.6	4		0.6	2.1	1.9	1.7	2.8	4.2	2.5
	Hackett	3.5	1.4	1.9	1.2	3.4	0.6		1.6	2.4	1.2	2.2	3.6	1.9
	Kolak	2.5	1.5	2	2	3.9	2.1	1.6		2.7	0.3	1.5	2	2.5
	McNeel	5.3	3.2	0.8	1.2	5.2	1.9	2.4	2.7		2.4	3.6	4.4	4.2
	Memorial	2.7	1.1	1.8	1.6	3.1	1.7	1.2	0.3	2.4		1.6	2.3	2.1
	Merrill	1.6	1.1	3.1	3.1	2.7	2.8	2.2	1.5	3.6	1.6		1.5	1.4
	Robinson	0.4	2.1	3.9	4	2.5	4.2	3.6	2	4.4	2.3	1.5		2.6
	Todd	2.7	0.6	3.6	3.1	1.7	2.5	1.9	2.5	4.2	2.1	1.4	2.6	



WISCONSIN DEPARTMENT OF REVENUE
 2135 RIMROCK RD
 PO BOX 8949
 MADISON, WI 53708-8949

State of Wisconsin • DEPARTMENT OF REVENUE

2135 RIMROCK RD PO BOX 8949 MADISON, WI 53708-8949
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December 7, 2011

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SCHOOL DISTRICT OF BELOIT
 1633 KEELER AVE
 BELOIT WI 53511-4713

This is your Wisconsin Sales and Use Tax Certificate of Exempt Status (CES). Purchases made by your organization or entity are taxable unless you provide a properly completed Wisconsin Sales and Use Tax Exemption Certificate (Form S-211), listing the CES number shown below, to your supplier(s).

If your organization makes sales, they may be subject to sales tax collection and you may be required to obtain a Seller's Permit. Information regarding registration requirements can be found in our Publication 206, Sales Tax Exemption for Nonprofit Organizations.

Forms and Publications can be obtained through our web site at www.revenue.wi.gov or through our forms ordering line at (608) 266-1961. Many questions can be answered by reviewing the FAQ pages on our web site. You may also contact us by telephone at (608) 266-2776 or by email at sales10@revenue.wi.gov.



**WISCONSIN SALES AND USE TAX
 CERTIFICATE OF EXEMPT STATUS (CES)**
 (Governmental, Religious, Charitable, Scientific or Educational Organization)

Sales to this organization or entity are exempt from Wisconsin sales and use tax under sec. 77.54(9a) and 77.55(1), Wis. Stats.

This certificate is valid unless cancelled by the Wisconsin Department of Revenue.

SCHOOL DISTRICT OF BELOIT
 1633 KEELER AVE
 BELOIT WI 53511-4713

CES NUMBER	060425
DATE ISSUED	12/2/2011

IMPORTANT:

Purchases made by your organization are taxable unless you furnish your supplier with the CES number shown above.

Sales by your organization may be subject to tax. If your organization makes taxable sales, it may be required to obtain a seller's permit and remit sales tax to the Department of Revenue.

Questions: Contact the Department of Revenue by telephone at (608) 266-2776, FAX (608) 267-1030, E-mail sales10@revenue.wi.gov, or at our Web site www.revenue.wi.gov



1500 Fourth St.
Beloit, Wisconsin 53511
(608) 361-4000
FAX (608) 361-4122

Board of Education

Kyle Larsen, President
Megan Miller, Vice President
John Wong, Clerk
Stephanie Jacobs, Treasurer
Spencer Anderson
Maria Delgado
Amiee Leavy

Interim Superintendent

Sue Green

The School District of Beloit complies with all federal, state and local laws prohibiting discrimination against students based on their membership in any protected class.

The School District of Beloit complies with all federal, state and local laws prohibiting discrimination in employment based on a person's membership in a protected class.

The mission of the School District of Beloit, committed to excellence and strengthened and enriched by diversity, is to prepare each student to compete, contribute and thrive as an admirable citizen in a rapidly changing world by engaging students in a wide variety of high quality, relevant programs in partnership with families, schools and the stateline community.