

RESTRUCTURING & SEVEN-YEAR PLAN

SC CONSERVATION BANK

Date of Submission: 3/31/2015

Please provide the following for this year's Restructuring and Seven-Year Plan Report.

	Name	Date of Hire	Email
Agency Director	Marvin N. Davant	8/16/2002	davantm@dnr.sc.gov
Previous Agency Director			

	Name	Phone	Email
Primary Contact:	Marvin N. Davant	803-734-3986	davantm@dnr.sc.gov
Secondary Contact:	Margie W. Rish Business Manager	803-734-0360	rishm@dnr.sc.gov

Is the agency vested with revenue bonding authority? (re: Section 2-2-60(E))	
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I have reviewed and approved the enclosed 2015 Restructuring and Seven-Year Plan Report, which are complete and accurate to the extent of my knowledge.

Current Agency Director
(Sign/Date):

(Type/Print Name):

MARVIN N. DAVANT

If applicable, Board/Commission Chair
(Sign/Date):

(Type/Print Name):

JAMES W. ROQUEMORE

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Insert the appropriate page numbers once the agency has completed the report.

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EXECUTIVE SUMMARY

I. Executive Summary

A. Historical Perspective

1. Please complete the Historical Perspective Chart. **(Chart I.A.1 attached)** In the Excel document attached, there is a template to complete under the tab labeled, "Historical Perspective." In this chart the Committee is asking the agency to provide a bullet style list of any major changes in the agency's purpose or mission and any restructuring that occurred (i.e., combining with or taking on other agency responsibilities, etc.) during the last ten years.

B. Purpose, Mission and Vision

1. Please complete the Purpose/Mission/Vision Chart. **(Chart I.B.1 attached)** In the Excel document attached, there is a template to complete under the tab labeled, "Purpose, Mission." The other specifics are included in the template.

C. Key Performance Measure Results

1. After completing the Key Performance Measurement Processes Section of this Report, please come back to this question and provide a summary of the results (bullet style results only, explanations should be included in the Key Performance Measurement Processes Section).

The sole mission of the SC Conservation Bank is to conserve and preserve significant properties (i.e. natural resource lands; wetlands; farmlands; urban parks; historical properties and archeological sites in SC by conservation easements, low interest loans and fee simple purchases to improve the quality of life in South Carolina for future generations.

ORGANIZATIONAL PROFILE

II. Organizational Profile

This section asks for a fact based description of the agency. Please provide information in the stated Excel template. If an Excel template is not referenced, provide the information in bullet style.

1. The agency's main deliverables (i.e., products or services) and the primary methods by which these are provided;
 - a. Complete the Key Deliverables Chart. **(Chart II.1 attached)** In the Excel document attached, there is a template to complete under the tab labeled, "Key Deliverables."
2. The agency's key customers and their requirements and expectations;
 - a. Complete the Key Customers Chart. **(Chart II.2 attached)** In the Excel document attached, there is a template to complete under the tab labeled, "Key Customers;"
3. The agency's key stakeholders (other than customers);
 - a. Complete the Key Stakeholders Chart. **(Chart II.3 attached)** In the Excel document attached, there is a template to complete under the tab labeled, "Key Stakeholders;"
4. Other state agencies which have the biggest impact on the agency's mission success;
 - a. Complete the Key Partner Agency Chart. **(Chart II.4 attached)** In the Excel document attached, there is a template to complete under the tab labeled, "Key Partner Agencies."
5. The agency's performance improvement system(s);
6. The agency's organizational structure in flow chart format; The SC Conservation Bank has a governing Board made up of 14 members as set forth in the "Overseeing Body Chart" attached **(Chart II.6)**.
7. Details about the body to whom the Agency Head reports;
 - a. Complete the Overseeing Body Chart. **(Chart II.6 attached)** In the Excel document attached, there is a template to complete under the tab labeled, "Overseeing Body-General" and "Overseeing Body-Individual Member."

8. Please complete the Major Program Areas Chart. **(Chart II.8 attached)** In the Excel document attached, there is a template to complete under the tab labeled, "Major Program Areas."
9. Please identify any emerging issues the agency anticipates may have an impact on its operations in the upcoming five years.
 - a. **Budgeting issues present continuing problems**
 - b. **The window of opportunity to conserve large tract of land that currently exist may be short lived.**
 - c. **Section 5 of the SC Conservation Bank Act stipulates that if the General Assembly in the annual General Appropriations Act provides less appropriations than what was provided the previous year to at least half of the state agencies or departments or if the Budget & Control Board orders across the board budget cuts the Conservation Bank will receive no further funding for that fiscal year.**
 - d. **The escalating costs of real estate in South Carolina**
 - e. **Budget restrictions and real estate market trends can restrict the amount of funding, reducing the amount of grants the Bank can fund.**

III. Laws (Statutes, Regulations, Provisos)

This section asks for state and federal statutes, regulations and provisos ("Laws") which apply to the agency.

1. Please complete the Legal Standards Chart. **(Chart III.1 attached)** In the Excel document attached, there is a template to complete under the tab labeled, "Legal Standards." In this Chart, please list all state and federal statutes, regulations and provisos that apply to the agency ("Laws"). The other specifics are included in the template.

IV. Reports and Reviews

This section asks for information about reports the agency is required to submit to a legislative entity and the agency's internal review process.

1. Please complete the Agency Reporting Requirements Chart. **(Chart IV.1 attached)** In the Excel document attached, there is a template to complete under the tab labeled, "Agency Reporting Requirements." In this Chart, please list all reports, if any, the agency is required to make to a legislative entity. The specifics as to each report are included in the template.
2. Please complete the Internal Audit Chart. **(Chart IV.2 attached)** In the Excel document attached, there is a template to complete under the tab labeled, "Internal Audits."

Does the agency already provide the information requested on this page, or similar information, in a report required by another entity? If yes, add the appropriate information to the Similar Information Requested Chart. If the agency looks in the Excel document attached, there is a template for the agency to complete for any questions which ask for the same information under the tab labeled, "Similar Info Requested."

RESTRUCTURING REPORT

V. Key Performance Measurement Processes

This category examines the agency's performance and improvement in key areas. Performance levels are examined relative to those of competitors and other organizations providing similar programs and services. Information is typically displayed by the use of performance measures. Quantitative measures may be supplemented by a discussion of qualitative measures where appropriate; however, every effort should be made to use appropriate quantitative measures that can be charted to show trends and comparisons to benchmarks.

Address only top-level results showing aggregate measures of agency-wide performance that are reflective of the value added to customers. Please include comparative data as applicable. These results are typically captured in performance goals and planning documents. When determining which processes are "key processes" consider the business impacts, and select those processes that are most important to the customer (both internal and external) to satisfy their requirements and/or those processes with problem areas identified by management.

Note: Results information (i.e., each chart, graph, table) reported for this category should be referenced to the specific question number (Ex. Chart 5.1-1, Graph 5.1-2, Table 5.1-3). The third digit identifies the sequential position of the specific chart, graph or table included in the agency's responses to each questions.

For each performance measurement included in response to the questions on the next page under Subsection A, please provide the following information:

- a. The performance goal(s)/benchmark(s) for the overall process output, and/or critical activities that produce the output.
 - i. Three agency/government entities in other states or non-government entities the agency considers the best in the country in this process or similar process and why.

Florida/North Carolina/Georgia – they have extensive programs similar to the SC Conservation Bank but with much larger staff and budget funds.

- ii. If the agency did not use results from an entity the agency listed in response to "i" as a performance goal/benchmark, why not and why did the agency choose the goal/benchmark it did?

Not comparable comparisons because of the difference in asset levels. The SCCB actually accomplishes more conserved lands with less funds.

- iii. Individual(s) who are not employed by the agency (government or non-government, located anywhere in the country) whom the agency considers an expert in the process or similar process and their contact information, or if deceased, name of books authored.

Not Known

- b. List the senior leaders who review the performance measure, their title and frequency with which they monitor it.

Board Chairman; Twice a year; Outside Auditors

- c. Trends the agency has seen and the method by which it analyzes trends in these results.

More applicants are using the Bank annually as demonstrated by the number of applications received.

- d. Whether the agency has reasonable control over this result (i.e., more than 50% or enough to be able to influence and accurately measure the result).

Agency has total control of the process depending on legislative funding.

- i. If the agency does not have reasonable control over this result, the other one or more agencies, who when combined with the agency, together have reasonable control over the result and names of those other agencies.

N/A

RESTRUCTURING REPORT

V. Key Performance Measurement Processes (cont.)

A. Results of Agency's Key Performance Measurements

Mission Effectiveness

1. What are the agency's actual performance levels for two to four of the agency's key performance measurements for mission effectiveness (i.e., a process characteristic indicating the degree to which the process output (work product) conforms to statutory requirements (i.e., is the agency doing the right things?))?
 - a. **As of 12/30/2014 245,213 acres conserved & preserved by conservation easements or fee simple purchases throughout the State at a cost of \$516/acre**
 - b. **As of 12/30/2014 grant awards had been made in 42 counties statewide.**

Mission Efficiency

2. What are the agency's actual performance levels for two to four of the agency's key performance measurements for mission efficiency (i.e., a process characteristic indicating the degree to which the process produces the required output at minimum resource cost (i.e., is the agency doing things right?)) including measures of cost containment, as appropriate?

The agency has increased the amount of protected significant lands in every statutorily required area. The agency continues to perform with only two employees.

Quality (Customer Satisfaction)

3. What are the agency's actual performance levels for two to four of the agency's key performance measurements for quality (i.e., degree to which a deliverable (product or service) meets customer requirements and expectations (a customer is defined as an actual or potential user of the agency's products or services)) for the agency as a whole and for each program listed in the agency's Major Program Areas Chart?
 - a. **Increase in conserved areas;**
 - b. **Maximizing leverage from other sources; and**
 - c. **Expanding grants geographically**

Workforce Engagement

4. What are the agency's actual performance levels for two to four of the agency's key performance measurements for workforce engagement, satisfaction, retention and development of the agency's workforce, including leaders, for the agency as a whole and for each program listed in the agency's Major Program Areas Chart?
 - a. **The agency has completed all its Major Program Areas with two fulltime employees with direction from the SC Conservation Bank Board.**

Operational/Work System Performance

5. What are the agency's actual performance levels for two to four of the agency's key performance measurements for operational efficiency and work system performance (includes measures related to the following: innovation and improvement results; improvements to cycle or wait times; supplier and partner performance; and results related to emergency drills or exercises) for the agency as a whole and for each program listed in the agency's Major Program Areas Chart?
 - a. **The agency has completed all its Major Program Areas with two fulltime employees with direction from the SC Conservation Bank Board**

RESTRUCTURING REPORT

V. Key Performance Measurement Processes (cont.)

B. Most Critical Performance Measures

1. Of the key performance measurement processes listed in Subsection A., which are the three most critical to achieving the overall mission of the agency?

All of Subsection A is critical to the success of the agency. The Bank grants are on a voluntary basis so quality in all of these areas is essential.

C. Databases/Document Management

1. List all electronic databases/document management/business intelligence systems or programs utilized by the agency, including, but not limited to all relational database management systems.

All accounting is maintained through the SCEIS System

D. Recommended Restructuring

Consider the process taken to review the agency's divisions, programs and personnel to obtain the information contained in response to all the previous questions in the Restructuring Report ("Process").

1. Yes or No, based on the information obtained and analysis performed during the Process, does the agency have any recommendations for restructuring (either that it could do internally or that would need the assistance of revised or new legislation) that would merge or eliminate duplicative or unnecessary divisions, programs, or personnel within each department of the agency to provide a more efficient administration of government services?

Not at this time.

- a. If yes, please provide the agency's suggestions.

SEVEN-YEAR PLAN

VI. Seven-Year Plan

A. General

1. Yes or No, does the agency have a plan that provides initiatives and/or planned actions the agency will take during the next seven fiscal years that implement cost savings and increased efficiencies of services and responsibilities in order to continually improve its ability to respond to the needs of the state's citizens? **YES**

If yes, go to Current/Recommended Actions Section.

If no, skip Current/Recommended Actions Section and go to Additional Questions.

B. Current/Recommended Actions

1. Describe all of the actions the agency is currently taking and plans it has for initiatives and actions during the next seven fiscal years to work to achieve greater efficiency in its operations in order to continually improve its ability to respond to the needs of the state's citizens? In this description, provide the names of all personnel who are responsible for overseeing the actions and plans.

The Agency currently has two employees (Marvin N. Davant and Margie W. Rish) and it has only have one mission which is to conserve and preserve significant properties in SC through conservation easements, low interest loans and fee simple purchases. Both employees work toward achieving these goals as set forth in the statute. Operational expenses are minimized using other state facilities such as IT, etc.

2. What are the anticipated cost savings and/or efficiencies that would be achieved by each action? **None**
3. Is legislative action required to allow the department/agency to implement the current or recommended actions? **None.**
4. If legislative action is required, please explain the constitutional, statutory or regulatory changes needed. **None**
5. Describe the agency actions that will be implemented to generate the desired outcomes for each recommendation. **None**

SEVEN-YEAR PLAN

VI. Seven-Year Plan(cont.)

6. What is the timeline for implementation of the change and realization of the anticipated benefits for each recommended action/change? **None**
Now go to Additional Questions.

C. Additional Questions

1. What top three strategic objectives of the agency will have the biggest impact on the agency's effectiveness in accomplishing its mission?
 - a. **Within the next 5 years improve the abundance & distribution of conserved properties**
 - b. **To increase the distribution, number & types of opportunities for use of conserved habitats and develop & maintain an inventory of conserved properties.**
 - c. **To improve public awareness & understanding of resource management issues & increase opportunities to participate in the process.**
2. What are the fundamentals required to accomplish the objectives?
 - a. **The Bank will have cumulatively conserved & preserved over 250,000 acres of diverse habitat.**
 - b. **The Bank plans to have awarded grants within all 46 counties of the State within the guidelines of the agency's mission.**
 - c. **Attend joint conferences & speaking engagements to explain the process & how it works. Implement a Legislative Education Outreach Program with field trips to grant sites.**
3. What links on the agency website, if any, would the agency like listed in the report so the public can find more information about the agency?

Sccbank.sc.gov

4. Is there any additional information the agency would like to provide the Committee or public?

All related information can be found on the website

SEVEN-YEAR PLAN

VI. Seven-Year Plan (cont.)

5. Consider the process taken to review the agency's divisions, programs and personnel to obtain the information contained in response to all the previous questions in the Restructuring Report and Seven-Year Plan ("Process"). State the total amount of time taken to do the following:
 - a. **Complete the Process - 4.5 days**
 - b. **Complete this Report – 1 day**
6. Please complete the Personnel Involved Chart. **(Chart VI.C.1 attached)** In the Excel document attached, there is a template to complete under the tab labeled, "Personnel Involved." Please list the name of all personnel at the agency who were consulted or performed work to obtain the information utilized when answering the questions in the Restructuring and Seven-Year Plan Report and their title and their specific role in answering the question (i.e., searched the agency documents, asked for information because they are in charge of the department, etc.).

CHARTS APPENDIX

VII. Excel Charts

Please send an electronic copy of the entire Excel Workbook and print hard copies of each of the Charts to attach here. Please print the charts in a format so that all the columns fit on one page. Please insert the page number each chart begins on below.

Similar Information Requested Chart _____ Chart 1

Historical Perspective Chart _____ Chart I.A.1

Purpose, Mission Chart _____ Chart I.B.1

Key Products Chart _____ Chart II.1

Key Customers Chart _____ Chart II.2

Key Stakeholders Chart _____ Chart II.3

Key Partner Agency Chart _____ Chart II.4

Overseeing Body Chart (General and Individual Member) _____ Chart II.6

Major Program Areas Chart _____ Chart II.8

Legal Standards Chart _____ Chart III.1

Agency Reporting Requirements Chart _____ Chart IV.1

Internal Audits Chart _____ Chart IV.2

Personnel Involved Chart _____ Chart VI.C.1

Does the agency already provide the information requested on this page, or similar information, in a report required by another entity? If yes, add the appropriate information to the Similar Information Requested Chart. If the agency looks in the Excel document attached, there is a template for the agency to complete for any questions which ask for the same information under the tab labeled, "Similar Info Requested."

Agency Reporting Requirements Chart

INSTRUCTIONS: List all reports, if any, the agency is required to submit to a legislative entity. Beside each include the following under the appropriate column: a) Name of the report; b) Legislative entity that requires the report; c) Law(s) that require the agency to provide the report; d) Stated legislative intent (from legislative entity, statute, regulation or other source) in providing the report; e) Frequency with which the report is required (i.e. annually, monthly, etc.); f) Approximate year the agency first started providing the report; g) Approximate cost to complete the report and any positive results from completing and submitting the report; and h) Method by which the agency receives, completes and submits the report (i.e. receive via emailed word document, log into or open program, enter data and click submit, etc.). Included below are examples of reports the agency may have to submit. The example does not include information in the columns under # of staff needed to complete the report; approx. total amount of time to complete the report and approx. total cost to complete the report, however the agency must complete these columns when submitting this chart in final form. Please delete the example figures before submitting this chart in final form, unless it applies to the agency, in which case ensure the information about those reports is complete. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Item #	Report Name	Legislative Entity Requesting Report	Law Requiring Report	Stated Intent of Report	Year First Required to Complete Report	Reporting Freq.	# of Days in which to Complete Report	Month Report Template is Received by Agency	Month Agency is Required to Submit the Report	Cost to Complete Report					Positive Results of Reporting	Method in which Report Template is Sent to Agency (i.e. via email;	Format in which Report Template is Sent to Agency	Method in which Agency Submits Completed Report (i.e. email; mail; click; submit on web based form;	Format in which Agency Submits Completed Report (word, excel)
											# of Staff Members Needed to Complete Report	Approx. Total Amount of time to Complete Report	Approx. total Cost to Agency to Complete (considering staff time,							
SC Conservation Bank	1	Restructuring Report	House Legislative Oversight Committee	1-30-10(G)(1)	Increased Efficiency	2015	Annually	30	February	March	2	4.5 days	\$2,614.00		TBD		Email and Hardcopy	Word and Excel	Email and Hardcopy	Word and Excel
Agency ABC	2	Accountability Report	Executive Budget Office	1-1-820	To provide the Governor and General Assembly with information that supports their analysis of the budget	2002	Annually	60	July	September	2	2 days	\$1,162.00				Email and Hardcopy	Word and Excel	Email and Hardcopy	Word and Excel

*Agency is statutorily required to be audited externally as assigned by the State Auditor's Office

Agency Name: SC CONSERVATION BANK
Agency Code: EXECUTIVE
Agency Section: P40

Similar Information Requested Chart

INSTRUCTIONS: Please provide details about other reports which investigate the information requested in the Restructuring Report. This information is sought in an effort to avoid duplication in the future. In the columns below, please list the question number in this report, name of the other report in which the same or similar information is requested, section of the other report in which the information is requested, name of the entity that requests the other report and frequency the other report is required. **NOTE:** Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Restructuring Report Question #	Name of Other Report	Section of Other Report	Entity Requesting Report	Freq. Other Report is Required
SC Conservation Bank	None				

Agency Name: SC CONSERVATION BANK
Agency Section: EXECUTIVE
Agency Code: P40

Historical Perspective Chart

INSTRUCTIONS: Please provide information about any restructuring or major changes in the agency's purpose or mission **during the last ten years**. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Year	Description of Restructuring that Occurred	Description of Major Change in Agency's Purpose or Mission
SC Conservation Bank		None	None

Agency Name: SC CONSERVATION BANK
 Agency Code: EXECUTIVE
 Agency Section: P40

Purpose/Mission/Vision Chart

INSTRUCTIONS: Provide information about the date the agency, in its current form, was initially created and the present purpose, mission and vision of the agency, with the date each were established in paranethesis. The Legal Standards Cross Reference column should link the purpose, mission and vision to the statutes, regulations and provisos listed in the Legal Standards Chart, which they satisfy.

Agency Submitting Report	Date Agency created	Purpose	Mission	Vision	Legal Standards Cross References
SC CONSERVATION BANK	2002	To conserve and preserve significant properties in SC by conservation easements, low interest loans and purchase of title	To improve the quality of Life in SC through the conservation and preservation of significant natural resource lands, wetlands, farmlands, urban parks, historical properties and archeological sites.	To improve the quality of life in SC by permanently protecting farmland, forestland, wetlands, openlands, urban parks, historic sites and natural resources	Purpose:48-59-10 et seq Mission: 48-59-10 et seq Vision: 48-59-10 <i>et seq</i>

Agency Name: SC CONSERVATION BANK

Agency Code: EXECUTIVE

Agency Section: P40

Key Partner Agencies Chart

INSTRUCTIONS: List the names of the other state agencies which have the biggest impact on the agency's mission success (list a minimum of three); partnership arrangements established and performance measures routinely reviewed with the other entity. The Major Program Areas Cross References Column should link the Partner Agency to the major program area, in the Major Program Areas Chart, on which it has the biggest impact. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable and a minimum of three.

Agency Submitting Report	Agency w/ Impact on Mission Success	Partnership Arrangement Established	Performance Measures Routinely Reviewed Together	Major Program Areas Cross Reference
SC Conservation Bank	SCDNR; SCRPT; SC Forestry	The SCCB has partnered with the SCDNR; SCPRT; SC Forestry; many county Soil & Water Conservation Districts; municipalities; Land Trusts and various non-profit organizations granting conservation easement and providing match funding for land purchases.	Measures are reviewed twice a year at the regular SCCB Board Meetings.	SC Code 48-59-10 <i>et seq</i>

INSTRUCTIONS: Provide information about the agency's key deliverables (i.e. products or services), primary methods by which these are delivered; and, as applicable, actions that may reduce the general public and/or other agencies initial or repetitive need for the deliverable. List each deliverable on a separate line. If there are multiple ways in which the deliverable is provided, list the deliverable multiple times with each delivery method on a separate line. In the "Three Greatest" column, indicate and rank the three most significant deliverables the agency brings to the people of South Carolina with #1 being the most significant. For the deliverables which are not one of three most significant, do not put anything in this column. The Major Program Areas Cross References Column should link the deliverable to the major program area, in the Major Program Areas Chart, within which that product or service is provided. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Item #	Deliverable (i.e. product or service)	Three Most Significant (#1, #2, #3)	Primary Method of Delivery	What can be done to reduce the general public and/or other agencies initial need for this deliverable? (i.e. preventive measures before the citizen or agency needs to come to the agency)	What can be done to reduce the general public and/or other agencies need to return for this deliverable? (i.e. preventive measures to ensure they do not need to come back to the agency for this service or product after already receiving it once)	If deliverable is identified as one of the three most significant, what would allow the agency to focus on it more?	Major Program Areas Cross Reference
SC Conservation Bank	1	To make grants and loans to qualified public and private entities to acquire interests in real property worthy of conservation	#1	To accept and review land conservation proposals and make grants or loans in accordance with statutory criteria (SC Code §48-29-10 et seq)	The agency grants are voluntary and the public is encouraged to contact the Conservation Bank	The public is encouraged to use the Bank's services	This is the agency's main and only service	SC Code 48-59-10 et seq
	2							
	3							
	4							
	5							
	6							

Agency Name: SC CONSERVATION BANK
 Agency Section: EXECUTIVE
 Agency Code:P40

Key Customers Chart

INSTRUCTIONS: Provide information about the key customer segments identified by the agency and each segment's key requirements/expectations. A customer is defined as an actual or potential user of the agency's deliverables. Please be as specific as possible in describing the separate customer segments (i.e. do not simply put "public.") The Deliverables Cross References column should link customer groups to the deliverable listed in the Key Deliverables Chart, which they utilize. **NOTE:** Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Item #	Customer Segments	Requirements/Expecations	Deliverables Cross References
SC Conservation Bank	1	State Agencies/Municipalities/Land Trusts/Non-Profit Entities	The agency grants are voluntary and the public is encourages to contact the Conservation Bank.	1
	2			
	3			
	4			
	5			
	6			

Key Stakeholder Chart

INSTRUCTIONS: Provide information about the agency's key stakeholder groups and their key requirements and expectations. A stakeholder is defined as a person, group or organization that has interest or concern in an agency. Stakeholders can affect or be affected by the agency's actions, objectives and policies. Please be as specific as possible in describing the separate stakeholder groups (i.e. please do not simply put "the public.") The Deliverables Cross References column should link stakeholder groups to the deliverable, listed in the Key Deliverables Chart, for which they group has the most interest or concern. **NOTE:** Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Item #	Stakeholder Group	Requirements/Expecations	Deliverables Cross References
SC CONSERVATION BANK	1	State Agencies/Municipalities/Land Trusts/ Non-Profit Entities	To review and fund grant requests to the extent the properties are significant and funding is available.	1
	2			
	3			
	4			
	5			
	6			

INSTRUCTIONS: Provide information about the body that oversees the agency and to whom the agency head reports including what the overseeing body is (i.e. board, commission, etc.); total number of individuals on the body; whether the individuals are elected or appointed; who elects or appoints the individuals; the length of term for each individual; whether there are any limitations on the total number of terms an individual can serve; whether there are any limitations on the number of consecutive terms an individual can serve; and any other requirements or nuances about the body which the agency believes is relevant to understanding how the agency performs and its results.

Agency Submitting Report	Type of Body (i.e. Board, Commission, etc.)	# of Times per Year Body Meets	Total # of Individuals on the Body	Are Individuals Elected or Appointed?	Who Elects or Appoints?	Length of Term	Limitations on Total Number of Terms	Limitations on Consecutive Number of Terms	Challenges Imposed or that Agency staff and the Body have faced based on the structure of the overseeing body	Other Pertinent Information
SC CONSERVATION BANK										

Overseeing Body - Individual Members Chart

INSTRUCTIONS: Provide information about the individual members on the body that oversees the agency including their name, contact information, length of time on the body, profession and whether they are a Senator or House Member. The Major Program Areas Cross References Column should link the individual to the major program area, in the Major Program Areas Chart, in which the individual has a particular influence, if any, by way of serving on a subcommittee within the body, task force, etc. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Name of Individual on Body	Contact Information	Profession	Date First Started Serving on the Body	Last Date Served on the Body	Length of Time on the Body (in years)	Senator or House Member? (put Senate or House)	Major Program Areas Cross Reference
SC Conservation Bank	William L. Snow, Sr. (First Congressional District)	2671 Abbapoola Rd, Johns Island, SC 29455	CEO Palmetto Gunite	1/9/2007	7/1/2015	8 years	Senate	48-59-10 et seq
SC Conservation Bank	Harry E. Shealy, Jr. (Second Congressional District)	704 S Broadway Ave SE, Aiken SC 29801	Retired	3/30/2012	7/1/2015	3 years	Senate	48-59-10 et seq
SC Conservation Bank	Thomas W. Miller (Third Congressional District)	PO Box 1853, Anderson, SC 29622	Real Estate	7/1/2002	7/1/2017	13 years	House	48-59-10 et seq
SC Conservation Bank	C. Douglas Harper (Fourth Congressional District)	35 W. Court Street, Greenville, SC 29601	Chairman, Harper Corp. - General Contractors	9/11/2014	7/1/2018	less than 1 year	House	48-59-10 et seq
SC Conservation Bank	H. Boyd Brown (Fifth Congressional District)	807 Gervais Street, Suite 301, Columbia, SC 29201	Real Estate	2/10/2015	7/1/2015	less than 1 year	Senate	48-59-10 et seq
SC Conservation Bank	Charles G. Lane (Sixth Congressional District)	1071 Morrison Drive, Charleston, SC 29403	Real Estate	7/1/2002 and 2/13/2015	12/3/2008 and 7/1/2019	6 years (1st term) and less than 1 yr (2d term)	House	48-59-10 et seq
SC Conservation Bank	D. Clinch Heyward (Seventh Congressional District)	1104 Club Circle, Pawleys Island, SC 29585	Real Estate	2/6/2013	7/1/2017	2 years	Senate	48-59-10 et seq
SC Conservation Bank	Michael G. McShane (State at Large)	1501 Ravens Point Rd Johns Island, SC 29455	Surgical Supplies	5/31/2013	7/1/2017	2 years	House	48-59-10 et seq
SC Conservation Bank	Andrea Clark (State at Large)	PO Box 297, Ridgeland, SC 29936		3/7/2005	7/1/2016	11 years	Governor	48-59-10 et seq
SC Conservation Bank	Elliott S. Close (State at Large)	PO Box 4200, Rock Hill, SC 29732	Lawyer	7/8/2002	current	13 years	Governor	48-59-10 et seq
SC Conservation Bank	James W. Roquemore (State at Large)	3086 Five Chop Rd., Orangeburg, SC 29115	CEO Supersod	11/15/2005	7/1/2017	10 years	Governor	48-59-10 et seq
SC Conservation Bank	D. Glenn McFadden	787 McBrothers Drive Fort Lawn, SC 29714	Chairman, SCDNR Board	2014	currently	1 year	Ex-Officio set by statute	48-59-10 et seq
SC Conservation Bank	Frank A. McLeod	PO box 1919, Sumter, SC 29151	Chairman, SC Forestry Commission		currently	9+ years	Ex-Officio set by statute	48-59-10 et seq

Agency Name: SC Conservation Bank
 Agency Code: P40
 Agency Section: Executive

Overseeing Body - Individual Members Chart

SC Conservation Bank	Duane N. Parrish	1205 Pendleton St, Suite 248, Columbia, SC 29201	Director, SCPRT	2013	currently	3 years	Ex-Officio set by statute	48-59-10 et seq

INSTRUCTIONS: Provide information about the agency's Major Program Areas as those are defined in the Appropriations Act. When completing columns B - K, the agency can copy and paste the information the agency submitted in the Program Template of the FY 2013-14 Accountability Report, just make sure of the following:

a) List only the programs that comprise at least 80% of the total budget and include the % of total budget. The remainder of the programs should be "listed ONLY" in the box labeled "Remainder of Programs", with those program expenditures detailed in the box labeled "Remainder of Expenditures." If the agency has trouble understanding what is requested, refer to the 2012-13 Accountability Report, Section II, number 11.

b) The "Associated Objective(s)" column in the Program Template of the FY 2-13-14 Accountability report has been changed to "Key Performance Measures Cross References." The Key Performance Measures Cross References column should link major programs to charts/graphs in the Key Performance Measurement Processes Section (ex. Chart 5.2-1 or Graph 5.2-2). If the agency has trouble understanding what is requested, refer to the 2012-13 Accountability Report, Section II, number 11; and

c) An additional column, titled "Legal Standards Cross References," has been added at the end. The Legal Standards Cross Reference column should link major programs to the statutes, regulations and provisos listed in the Laws Section of this report, which they satisfy. Included below is an example, with a partial list of past Major Program Areas from the Department of Transportation. The example does not include information in the columns under expenditures, key performance measures cross reference, legal standards cross references or remainder of expenditures, however the agency must complete these columns when submitting this chart in final form. Please delete the example information before submitting this chart in final form. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Note:

- Key Performance Measures Cross References Column links major programs to the charts/graphs in the Key Performance Measurement Processes Section of the Restructuring Report.
- Legal Standards Cross References Column links major programs to the statutes, regulations and provisos they satisfy which are listed in the Laws Section of the Restructuring Report.

Agency Submitting Report	Program/Title	Purpose	FY 2012-13 Expenditures				FY 2013-14 Expenditures				Key Performance Measures Cross Reference	Legal Standards Cross References
			General	Other	Federal	TOTAL	General	Other	Federal	TOTAL		
SC Conservation Bank	I. Administration	To conserve significant properties in SC by conservation easements, low interest loans and purchase of title and the administration of routine office operations		\$8,062,772.99		\$8,062,772.99		\$10,713,308.50		\$10,713,308.50		SC Code § 48-59-10 et seq
		% of Total Budget:		85% of Total Budget:	% of Total Budget:	85% of Total Budget:	% of Total Budget:	94% of Total Budget:	% of Total Budget:	94% of Total Budget:		
	II. Employer Benefits	State Employer Contributions		\$38,185.41		\$38,185.41		\$38,852.80		\$38,852.80		SC Code § 48-59-10 et seq
		% of Total Budget:		.0037 of Total Budget:	% of Total Budget:	.0037 of Total Budget:	% of Total Budget:	.0034 of Total Budget:	% of Total Budget:	.0034 of Total Budget:		

Remainder of Programs: List any programs not included above and show the remainder of expenditures by source of funds.
N/A

Remainder of Expenditures:									
	% of Total Budget	% of Total Budget	% of Total Budget	% of Total Budget	% of Total Budget	% of Total Budget	% of Total Budget	% of Total Budget	% of Total Budget

Legal Standards Chart

[illegible]

INSTRUCTIONS: List all reports, if any, the agency is required to submit to a legislative entity. Beside each include the following under the appropriate column: a) Name of the report; b) Legislative entity that requires the report; c) Law(s) that require the agency to provide the report; d) Stated legislative intent (from legislative entity, statute, regulation or other source) in providing the report; e) Frequency with which the report is required (i.e. annually, monthly, etc.); f) Approximate year the agency first started providing the report; g) Approximate cost to complete the report and any positive results from completing and submitting the report; and h) Method by which the agency receives, completes and submits the report (i.e. receive via emailed word document, log into or open program, enter data and click submit, etc.). Included below are examples of reports the agency may have to submit. The example does not include information in the columns under # of staff needed to complete the report, approx. total amount of time to complete the report and approx. total cost to complete the report, however the agency must complete these columns when submitting this chart in final form. Please delete the example figures before submitting this chart in final form, unless it applies to the agency, in which case ensure the information about those reports is complete. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Item #	Report Name	Legislative Entity Requesting Report	Law Requiring Report	Stated Intent of Report	Year First Required to Complete Report	Reporting Freq.	# of Days in which to Complete Report	Month Report Template is Received by Agency	Month Agency is Required to Submit the Report	# of Staff Members Needed to Complete Report	Cost to Complete Report		Positive Results of Reporting	Method in which Report Template is Sent to Agency (i.e. via email, via email, etc.)	Format in which Report Template is Sent to Agency	Method in which Agency Submits Completed Report (i.e. email; mail; click submit on web based form; etc.)	Format in which Agency Submits Completed Report (word, excel, etc.)
												Approx. Total Amount of time to Complete Report	Approx. total Cost to Agency to Complete (considering staff time, etc.)					
SC Conservation Bank	1	Restructuring Report	House Legislative Oversight Committee	1-30-10(G)(1)	Increased Efficiency	2015	Annually	30	February	March	2	4.5 days	\$2,014.00	TBD	Email and Hardcopy	Word and Excel	Email and Hardcopy	Word and Excel
Agency ABC	2	Accountability Report	Executive Budget Office	1-1-820	To provide the Governor and General Assembly with information that supports their analysis of the budget	2002	Annually	60	July	September	2	2 days	\$1,162.00		Email and Hardcopy	Word and Excel	Email and Hardcopy	Word and Excel

*Agency is statutorily required to be audited externally as assigned by the State Auditor's Office

INSTRUCTIONS: Identify the agency's internal audit system and policies during the past five fiscal years including the date the agency first started performing audits; individuals responsible for hiring the internal auditors; individuals to whom internal auditors report; the head internal auditor; general subject matters audited; the individual or body that makes decision of when internal audits are conducted; information considered when determining whether to conduct an internal audit; total number of audits performed in the last five fiscal years; # of months it took for shortest audit; # of months for longest audit; average number of months to complete an internal audit; and date of the most recent Peer Review of Self-Assessment by SC State Internal Auditors Association or other entity (if other entity, name of that entity).

Note: All audits are not the result of suspicious activity or alleged improper actions. Often times regular audits are required by statute regulation or an agency's standard operating procedure simply as a method of ensuring operations are staying on track.

Agency Submitting Report	Does agency have internal auditors? Y/N	Date Internal Audits Began	Individuals responsible for hiring internal auditors	Individuals to whom internal auditors report	Name and contact information for head Internal Auditor	General subject matters audited	Who makes decision of when an internal audit is conducted	Information considered when determining whether to conduct an internal audit	Do internal auditors conduct an agency wide risk assessment routinely? Y/N	Do internal auditors routinely evaluate the agency's performance measurement and improvement systems? Y/N	Total Number of Audits performed in last five fiscal years	# of months for shortest audit	# of months for longest audit	Avg. # of months needed to conduct audit	Date of most recent Peer Review of Self-Assessment by SC9IAA or other entity (if other entity, name of that entity)
SC Conservation Bank	N														

Agency Name: SC CONSERVATION BANK
 Agency Code: EXECUTIVE
 Agency Section: P40

Personnel Involved Chart

INSTRUCTIONS: List the name of all personnel at the agency who were consulted or performed work to obtain the information utilized when answering the questions in these reports, their title and their specific role in answering the question (i.e. searched the agency documents, asked for information because they are in charge of the department, etc.) Please delete the example information and instructions row before submitting this chart in final form. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Name	Phone	Email	Department/Division	Title	Question	Role in Answering Question
SC Conservation	Marvin N. Davant	803-734-3896	davantm@dnr.sc.gov	Executive	Director		Reviewed data as prepared
	Margie W. Rish	803-734-0360	rishm@dnr.sc.gov	Executive	Business Manager		Pulled data from SCEIS, Accountability Report and agency files for information.



From: House Committee on Legislative Oversight <HCommLegOv@schouse.gov>
Date: March 2, 2015 at 2:47:47 PM EST
To: House Committee on Legislative Oversight <HCommLegOv@schouse.gov>
Subject: Agency Restructuring and Seven-Year Plan Report Submission to the House Legislative Oversight Committee

Dear State Agency Heads:

Pursuant to Section 1-30-10(G) state agencies must submit restructuring reports and a seven-year plan for increased cost savings and efficiencies to the Governor and General Assembly. **Enclosed please find guidelines for submitting an agency's restructuring and seven-year plan report for increased cost savings and efficiencies to the House Legislative Oversight Committee.** For more information about this House Committee, please follow the link in this email. Also, you may visit the South Carolina General Assembly Home Page (<http://www.scstatehouse.gov>) and click on "Citizens' Interest" then click on "House Legislative Oversight Committee Postings and Reports".

The House Legislative Oversight Committee requests this information be submitted to it electronically by **MARCH 31, 2015**, (HCommLegOv@schouse.gov) in both the original format (Word and Excel) as well as in a PDF document. The signed copy of the submission form with a hard copy of the information should be mailed to the House Legislative Oversight Committee, Post Office Box 11867, Columbia, South Carolina 29211. **Please note an agency's restructuring and seven-year plan report for increased cost savings and efficiencies submitted to the House Legislative Oversight Committee will be published on the General Assembly's website.** Committee staff are available to answer any questions about submitting this information, and contact information for Committee staff is included in the guidelines.

The Committee realizes some of the requested information may seem time consuming to compile for this initial report but updates to that information in the future will be an easier process. In addition, by requesting information in this format, it is the Committee's goal to examine where potential duplication can be eliminated as it relates to reporting for agencies, among other areas.

On behalf of the entire House Legislative Oversight Committee, thank you in advance for your cooperation and for your service to the citizens of South Carolina. The House Legislative Oversight Committee looks forward to working with your agency.

Sincerely,

Wm. Weston J. Newton
Chairman, House Legislative Oversight Committee