

California State University San Marcos
College of Education

EDAD 616B: Resource Allocation

Class Meetings: Tuesdays 7:15 – 9:15 p.m. January 23 – May 8, 2007

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Mission Statement of the College of Education

The mission of the College of Education Community is to collaboratively transform public education by preparing thoughtful educators and advancing professional practices. We are committed to diversity, educational equity and social justice, exemplified through reflective teaching, lifelong learning, innovative research and on-going service. Our practices demonstrate a commitment to student-centered education, diversity, collaboration, professionalism, and shared governance.

Authorization to Teach English Learners: The credential program has been specifically designed to prepare teachers for the diversity of languages often encountered in California public school classrooms. The authorization to teach English Learners is met through the infusion of content and experiences within the credential program, as well as additional coursework. Students successfully completing this program receive a credential with authorization to teach English Learners.

Students with Disabilities Requiring Reasonable Accommodations: Students are approved for services through the Disabled Student Services Office (DSS). This office is located in Craven Hall 5205, and can be contacted by phone at (760) 750-4905, or TTY (760) 750-4909. Students authorized by the DSS to receive reasonable accommodations should meet with their instructor.

CSUSM Academic Honesty Policy: Students will be expected to adhere to standards of academic honesty and integrity, as outlined in the Student Academic Honesty Policy. All written work and oral assignments must be original work. All ideas/materials that are borrowed from other sources must have appropriate references to the original sources. Any quoted material should give credit to the source and be punctuated with quotation marks. Students are responsible for honest completion of their work including examinations. There will be no tolerance for infractions. IF you believe that there has been an infraction by someone in the class, please bring it to the instructor's attention. The instructor reserves the right to discipline any student for academic dishonesty in accordance with the general rules and regulations of the university. Disciplinary action may include the lowering of grades and/or the assignment of a failing grade for an exam, assignment, or the class as a whole.

All University Writing Requirement: This course meets the university requirements of 2500 words. Students are expected to write at the graduate studies level. Specific required writing assignments are explained in the course assignments section.

Attendance Policy: Due to the dynamic and interactive nature of courses in the College of Education, all students are expected to attend all classes and participate in a way that reflects thorough preparation. You must be present at 80% of the class meetings to receive credit for the course. Students should contact the instructor prior to any absences, if possible.

COURSE DESCRIPTION

Candidates learn basic elements of school finance and responsibilities of administrators for allocating financial and other resources in an equitable manner. Candidates will have the opportunity to discuss budgeting principles that are based on the distribution of resources in support of all students' learning.

CALIFORNIA COMMISSION on TEACHER CREDENTIALING (CCTC) STANDARDS for PRELIMINARY ADMINISTRATIVE CREDENTIAL

Each student should be an educational leader who promotes the success of all students by:

1. facilitating the development, articulation, implementation and stewardship of a vision of learning that is shared and supported by the school community;
2. advocating, nurturing, and sustaining a school culture and instructional program conducive to student learning and staff professional growth;
3. ensuring management of the organization, operations, and resourced for a safe, efficient, and effective learning environment;
4. collaborating with families and community members, responding to diverse community interests and needs, and mobilizing community resources;
5. modeling a personal code of ethics and developing professional leadership capacity, and;
6. understanding, responding to, and influencing the larger political, social, economic, legal and cultural context.

COURSE OPPORTUNITIES

Students will accomplish the following:

1. Review some of the history of school finance to develop an understanding of traditions which bring us to the present system of funding public school education in California: Federal government and function of the states, California school finance history, legislation, court cases, student demographics, economic trends, fiscal outlook, equalization issues, taxation, collective bargaining, and the state budgeting process
2. Define the role and function of the business office and the chief business official
3. Identify local, state and federal revenue sources for the school and district budget and regulations governing these. Become familiar with other funding sources
4. Demonstrate knowledge of various types of school district funds in order to make appropriate decisions on resource allocations for identified priorities, *including the addition of new positions at either the district or site level*
5. Become knowledgeable about budget expenditures, classifications, object codes in order to understand how to designate resources to enhance student achievement
6. Gain knowledge of school and district budget formats, reports, and accounting procedures
7. Understand the processes needed to develop and monitor a budget and expenditure plan
8. Demonstrate the ability to align educational programs to cost factors and program budgeting, including the cost of employees
9. Understand budget considerations for special and categorical programs (*including Special Education and GATE*) and apply these to principles of equity and equality in meeting diverse student and community needs
10. *Develop awareness of potential problem areas in budgeting, including PTO/PTA, Supplies, ASB, Overtime, Copies, Curricular Trips, triggering benefited positions, carryover*
11. Understand how technology is used for building, monitoring, and implementing budgets and accounting systems
12. Learn how to align facility and budget planning with enrollment projections
13. Become knowledgeable about the operation of business support services such as Transportation, Maintenance & Operations, and Child Nutrition Services
14. Build a budget to implement the Single Plan for Student Achievement
15. Reflect on personal and professional practices in terms of ethical decision-making

TEXTBOOKS (optional)

- *Revenues and Revenue Limits, A Guide to School Finance in California – 2007 Edition*, by Paul Goldfinger and Jannelle Kubinec, School Services of California
- Recommended Websites
 - School Services of California
 - California Department of Education
 - California School Finance
- From Your District:
 - District and Site Budget
 - Collective Bargaining Agreements

ASSIGNMENTS AND GRADING:

Performance-based assessments will be included as part of the grading criteria. Students will be evaluated on class participation and written assignments. The final grade will be based upon 50% class participation, 25% on the written assignments, and 25% on written assignments. Preliminary assignments will include:

- (1) A compilation of written reflections at the end of each class to be submitted at the end of the course
- (2) Group current events summaries (2)
- (3) A written analysis of two school budgets
- (4) Development of a Single Plan for Student Achievement
- (5) Group project (power point presentation with note pages or one page summary)

REQUIREMENTS:

1. Demonstrate knowledge and competence in stated objectives
2. Complete assigned readings, participate in class activities and discussions
3. Bring in current documents from the site and samples of budgets and other financial documents
4. Case studies
5. Prepare a budget using EXCEL and demonstrate its use as a tool for monitoring expenditures
6. Group project: Select a topic relevant to school finance. Each group will make a presentation highlighting the key issues and their impact on student learning. Examples of topics:
 - Pupil Transportation Costs, *Maintenance & Operations: Sub-Contract or keep within*
 - ADA and its Impact on Budget
 - NCLB
 - Salary Compensation
 - Special Education Financing
 - Categorical vs. General Aid
 - Funds for New School Construction
 - Aging School Plants and Facilities
 - Declining vs. increasing enrollment
 - Involving Parents and Community in Budgeting
 - Charter Schools
 - Increased/Decreased Funding and Student Achievement
 - Impact of Textbook Adoptions

Grading Scale:

A (93-100) A- (90-92) B+ (88-89) B (83-87) B- (80-82)
C+ (78-79) C (73-77) C- (70-72) D (60-69) F (0-59)

EDAD 616B Resource Allocation Session Schedule

Date	Topic
1/23	Class Introductions and Orientation The Basics of School Finance in California
1/30	Historical Benchmarks, Legislation and Court Rulings in CA School Finance
2/6	Equality of Funding for Schools in the United States
2/13	Equality of Funding for Schools in California Site Study Report
2/20	Structural Influences on the Internal Allocation of School District Resources (<i>ADA</i>)
2/27	Collective Bargaining Agreements and Staffing/ <i>The Cost of Litigation</i> Site Study Report
3/6	The Role of the Business Office and Staff: <i>Who You Should Know & Why</i> District Reports and Procedures
3/13	The Role of Site Staff and Councils Site Forms, Reports, & Procedures Group Report 1
3/20	The Financial Impact & Role of the County Office Group Report 2
4/3	Analyzing School Budgets to Determine Priorities/ <i>How to be an Advocate for Your School</i> Case Studies Group Report 3
4/10	Aligning Student Needs and School Goals in the Single Plan for Student Achievement with an Expenditure Plan, Day 2 Group Report 4
4/17	Aligning Student Needs and School Goals in the Single Plan for Student Achievement with an Expenditure Plan, Day 1 Group Report 5
4/24	Dr. Jennifer Jeffries, 8:00 The Use of Technology in Resource Allocation Group Report 6
5/1	Dr. Jennifer Jeffries, 7:15 The Use of Technology in Resource Allocation
5/8	Resource Allocation in High Priority Schools Group Report 7