

California State University San Marcos
Administrative Services Credential Program
Fall 2003
EDAD 634B: Educational Finance 1 Unit

Mondays 4:30-8:30 PM Four Sessions

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Office Hours: Wednesday 3-4:30 PM and by appointment

Mission of the College of Education at CSUSM. 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, life-long learning, innovative research, and on-going service. Our practices demonstrate a commitment to student-centered education, diversity, collaboration, professionalism and shared governance.

(adopted by COE Governance Community, October 1997)

Authorization to Teach English Learners. This 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. (approved by CCTC in SB 2042 Program Standards, August 02))

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 DSS to receive reasonable accommodations should meet with their instructor during office hours or, in order to ensure confidentiality in a more private setting.

Writing: In keeping with the All-University Writing Requirement, all 3-unit courses must have a writing component of at least 2,500 words (approximately 10 pages) which can be administered in a variety of ways.

Attendance Policy: Due to the dynamic and interactive nature of course in the COE, all students are expected to attend all classes and participate actively. At a minimum, students must attend more than 80% of class time, or s/he may not receive a passing grade for the course at the discretion of the instructor. In addition to the COE policy, students are asked to be respectful of the time and attention of their peers and the professor by arriving on time and remaining in class for the prescribed class time. Individuals with attendance issues should consult with the professor.

Please note: Educational Finance meets 4 times on September 8, 15, 22 and 29 from 4:30-8:15. To earn a passing grade you cannot miss more than 3 hours of course time during those 4 sessions.

Grading Policy: Students will be evaluated on class participation and written assignments. The final grade will be based 50% on class participation, 20% on the written assignments and 30% on in-class activities. Written assignment is to be prepared using 1 inch margins, 12 font, New Times Roman.

Texts and Resource Materials

- Websites
 - School Services of California
 - California Department of Education
- From Your District:
 - District and Site Budget
 - Collective Bargaining Agreements
 - (If you work in a non-public school setting, you need to obtain a copy of these document from a public school.)

Course Description

This course is the second in a two-course sequence articulating the financial and legal aspects of entry-level school administration and leadership. Students concentrate on basic principles and practices of school finance, including budget generation and implementation at site and district levels. Critical financial issues are addressed, as is the financial decision-making process. The relationship between law and finance are discussed as major responsibilities of school administrators and educational leaders.

Goals

This course will assist the candidate to:

1. understand the impact of state and federal governmental decisions on local school districts and school sites.
2. use financial mechanisms as management tools
3. prepare site budgets
4. effectively use financial resources for the benefit of the school community

Objectives

Upon the completion of the course, the candidate will know and understand:

- the roles of federal, state and local agencies in the budget process
- functions of school boards and district administrations in governance and financial policy-making
- financing public schools including historical development, district and site level funding and budgeting and financial implications of personnel contracts and other obligations
- financial implications of federally and state mandated programs and policies
- uses of educational technology in issues of educational finance

Session 1
September 8

Federal and State Finance Fundamentals for Site Administrators

- Philosophical and Legal Aspects of School Finance
- Federal and State Budget Factors
- School Finance Terms

Session 2 **District and Site Budget Fundamentals for Site Administrators**
September 15

- History of California School Finance
- Technical Aspects of District and Site Budgets or “How Do I Read This Thing?”
- How Collective Bargaining Agreements Shape Budgets
- The Administrator’s Role in Shaping Parent and Employee Budget Expectations
- Frequent Administrator Budgeting Errors

Assignment: Read “A History of Revenue Limits - Or Why is Your Base Revenue Limit Bigger Than Mine?” It can be accessed at www.sscal.com. Click “Education Resources,” then click “History of Revenue Limit.”

Bring your district and site budget.

Bring your Classified and Certificated Collective Bargaining Agreements. Be prepared to share three elements of each Collective Bargaining Agreement that have budget implications.

Session 3 **Scarce Resources in Times of High Expectations**
September 22

- Dwindling Discretionary Dollars
- Understanding “cost versus value”
- Use and Misuse of Advisory Groups
- The Position and the Person
- Position Control
- Personnel Service Units
- Effective Cost Saving Tips for Districts and Sites

Assignment: Read “Doing More With Less Fiscal Impact Index.” It can be accessed at www.sscal.com. Click Education Resources, then click “Doing More With Less Fiscal Impact Index.” Peruse the eleven pages of cost saving items. Concentrate on those marked “\$\$\$\$” and “\$\$\$.” Identify at least five ideas that you would like to have more information on. Bring a copy of pages 1 and 2 to class.

Session 4 **Budget Building Simulation Using Spread Sheets**
September 29

- Use of spread sheet to illustrate budget impact of staffing allocations
- Good and Bad Time Budgets
- Mission Driven Budgets

Assignment: Prepare a three to four page paper in which you discuss at three most significant aspects of school finance that you learned during this course. Describe what you learned and why you believe they are significant in terms of preparing to be a site administrator. End your paper with a paragraph in which you describe two to three budgeting principles that you believe you will use when you are an administrator.

Session 1 Federal and State Finance Fundamentals for Site Administrators

- Philosophical, Political and Legal Aspects of School Finance
- Federal and State Budget Factors
- School Finance Terms

Lesson Plan

Use COE Mission Statement to illustrate how finance needs to be mission driven.

In what ways is education finance a philosophical, political and legal discipline.

Division of federal, state and local authority via the power of the purse – local tax dollars for local school districts.

How local control has eroded.

Evidence of philosophical, political and legal content in district and site budget.

School Finance Terms

Federal and State Budgets

Distribute news clippings to teams of two. Read and develop questions or observations about implications or relevance to ed finance.

Dangerous Administrator Errors in Budgeting

Unused Vacation time

Supplies

Overtime

Gift of public funds

Petty Cash

PTA

ASB

Requiring students to pay for curricular and extra curricular

Equipment replacement costs

Copying machines

Supplanting versus supplementing relative to categorical funds

Bell schedule/instructional minutes

Inadvertently triggering benefited positions

Spending one time money on multi-year positions or programs