California State University SAN MARCOS | School of Education

333 South Twin Oaks Valley Road   San Marcos, California 92096-0001
Tel: 760.750.4300   Fax: 760.750.3160   www.csusm.edu/education

EDAD 616B Section 1
Resource Allocation
CRN #20598
Tuesday's January 20 through February 24
4:00 pm – 9:00 pm
Kellogg 5102
Spring 2015

Conceptual Framework Theme: Engaging diverse communities through leading and learning for social justice.

Professor: Dr. Tom McCoy
Phone: 858-740-4491
E-Mail: tmccoy@csusm.edu
Office: TBA
Hours: By Appointment

SCHOOL OF EDUCATION MISSION & VISION STATEMENT
(Adopted by SOE Governance Community, January 2013)

Vision
To serve the educational needs of local, regional, and global communities, the School of Education advances innovative practice and leadership by generating, embracing, and promoting equitable and creative solutions.

Mission
The mission of the School of Education community is to collaboratively transform education.   We:
- Create community through partnerships
- Promote and foster social justice and educational equity
- Advance innovative, student-centered practices
- Inspire reflective teaching and learning
- Conduct purposeful research
- Serve the School, College, University, and Community

Basic Tenets of our Conceptual Framework
- Student centered education
- Research and theory specific to the program field inform practice
- Connections and links between coursework and application
- Strong engagement between faculty and candidates
- Co-teaching clinical practice
- Culturally responsive pedagogy and socially just outcomes

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.

Course Prerequisites

Consent of the Program Coordinator

Goals

This course will assist the candidate to:

- Know and understand how various federal and state laws impact school and district policies as they relate to employee relations, student conduct, and student and parent rights.
- Research specific local issues and policies that are aligned with federal and state laws.
- Examine the personnel management process as a method of meeting legal standards within a diverse organization.

Course Objectives

In this course candidates will:

1. Review the history of school finance to develop an understanding of traditions that 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 and 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.
5. Gain knowledge of school and district budget formats, reports, and accounting procedures.
6. Understand the processes needed to develop and monitor a budget and expenditure plan.
7. Demonstrate the ability to align educational programs to cost factors and program budgeting, including the cost of employees.
8. Understand budget considerations for special and categorical programs and apply these to principles of equity and equality in meeting diverse student and community needs.
9. Develop awareness of potential problem areas in budgeting, including PTO/PTA, supplies, ASB, overtime, copies, carryover, etc.
10. Understand how technology is used for building, monitoring, and implementing budgets and accounting systems.
11. Learn how to align budget planning with enrollment projections.
12. Become knowledgeable about the operation of business support services such as Transportation, Maintenance & Operations, and Child Nutrition Services.
13. Understand a budget to implement the Single Plan for Student Achievement.
14. Reflect on personal and professional practices in terms of ethical decision-making.

Required Texts

No Required Text – please see attached list of Resources

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 partially met through the infusion of content and experiences within the credential program, as well as additional coursework. Students who successfully complete this program receive partial fulfillment of a credential to teach English learners.
(Approved by CCTC in SB 2042 Program Standards, August 02)

CTEL candidates will need to upload their graded CTEL signature assignment (with a passing grade or rubric indicating passing grade for assignment) to their **CTEL electronic portfolio** upon completion of this course. CTEL Program Coordinator will then review the candidate's CTEL standards in their electronic portfolio in order to fulfill their certification requirements for the California State Department of Education. For further clarification, please contact Ana Hernandez, CTEL Program Coordinator, at ahernand@csusm.edu.

Leadership Standards

This course will provide opportunities for participants to develop their leadership knowledge, skills, and depositions following the Preliminary Administrative Services Credential Program Standards

Category II - Curriculum

- Program Standard 6: Visionary Leadership: actionable and sustainable vision of teaching and learning that is responsive to the changing context of a given school
- Program Standard 7: Instructional Leadership: knowledge of the standards and the ability to monitor teaching and give feedback
- Program Standard 8: School Improvement Leadership: increases his/her capacity to communicate and lead others in continuous improvement
- Program Standard 9: Professional Learning and Growth Leadership: model and facilitate PD, including collaboration
- Program Standard 10: Organizational and Systems Leadership: understand, align, and integrate organizational structures, including resource management
- Program Standard 11: Community Leadership: communicate about the school and share with a broad range of stakeholders

Assessment of Professional Dispositions

Assessing a candidate's dispositions within a professional preparation program is recognition that teaching and leading with learners of all ages requires not only specific content knowledge and pedagogical skills, but positive attitudes about multiple dimensions of the profession.   The School of Education has identified six dispositions – social justice and equity, collaboration, critical thinking, professional ethics, reflective teaching and learning, and life-long learning—and developed an assessment rubric. The Educational Administration credential has included two additional dispositions: visionary and ready to lead. For each dispositional element, there are three levels of performance - *unacceptable*, *initial target*, and *advanced target*. The description and rubric for the three levels of performance offer measurable behaviors and examples.

The assessment is designed to provide candidates with ongoing feedback for their growth in professional dispositions and includes a self-assessment by the candidate. The dispositions and rubric are presented, explained and assessed in one or more designated courses in each program as well as in clinical practice.   Based upon assessment feedback, candidates will compose a reflection that becomes part of the candidate's final portfolio. Candidates are expected to meet the level of *initial target* during the program.

GENERAL CONSIDERATIONS

School of Education Attendance Policy

Due to the dynamic and interactive nature of courses in the School of Education, 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. Individual instructors may adopt more stringent attendance requirements. Should the student have extenuating circumstances, s/he should contact the instructor as soon as possible. *(Adopted by the COE Governance Community, December, 1997).*

Students with Disabilities Requiring Reasonable Accommodations

Students with disabilities who require reasonable accommodations must be approved for services by providing appropriate and recent documentation to the Office of Disabled Student Services (DSS). This office is located in Craven Hall 4300, 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.

All University Writing Requirement

In keeping with All-University Writing Requirement, this course will have a writing component of at least 2,500 words. This requirement will be met through the case study and action plan papers.

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 presentation 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 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."

Incidents of Academic Dishonesty will be reported to the Dean of Students. Sanctions at the University level may include suspension or expulsion from the University.

Plagiarism:

As an educator, it is expected that each student will do his/her own work, and contribute equally to group projects and processes. Plagiarism or cheating is unacceptable under any circumstances. If you are in doubt about whether your work is paraphrased or plagiarized see the Plagiarism Prevention for Students website http://library.csusm.edu/plagiarism/index.html. If there are questions about academic honesty, please consult the University catalog.

Use of Technology

Students are expected to demonstrate competency in the use of various forms of technology (i.e. blogs, email, Cougar Courses, internet research, and multimedia presentations). Specific requirements for course assignments with regard to technology are at the discretion of the instructor. All course assignments will be submitted and graded online, discussions will occur in class that include websites or reference checks. Each student is expected to bring their own device to class. Personal web activity during the class is discouraged.

Electronic Communication Protocol:

Electronic correspondence is a part of your professional interactions. If you need to contact the instructor, e-mail is often the easiest way to do so. It is my intention to respond to all received e-mails in a timely manner. Please be reminded that e-mail and on-line discussions are a very specific form of communication, with their own nuances and etiquette. For instance, electronic messages sent in all upper case (or lower case) letters, major typos, or slang, often communicate more than the sender originally intended. With that said, please be mindful of all e-mail and on-line discussion messages you send to your colleagues, to faculty members in the School of Education, or to persons within the greater educational community. All electronic messages should be crafted with professionalism and care.

Things to consider when using electronic communication:

- Would I say in person what this electronic message specifically says?
- How could this message be misconstrued?
- Does this message represent my highest self?
- Am I sending this electronic message to avoid a face-to-face conversation?

If there is ever a concern with an electronic message sent to you, please talk with the author in person in order to correct any confusion.

COURSE REQUIREMENTS

Guidelines for EDAD616B Assignments & Grading Standards

Assignments are graded on an expectation of mastery of the content and completion of the requested format for the assignment. Based on instructor feedback, students may make improvements on assignments and resubmit assignments for re-grading. Late assignments may result in loss of points and cannot be resubmitted without a rationale

(1) Participation: Come to class prepared to actively participate in discussion. (**weekly**, 10 points, *60 total*)

(2) Current Event Presentation: From the recommended on-line resources choose a current event/topic relevant to school finance and create an informative individual presentation of no more than 15 minutes for that topic. The presentation must include an interactive activity that requires class participation. (**assigned date**, 15 points)

(3) Budget Development: Develop a budget for a program in your school. Include a *decision making rubric* that defines priorities and a rationale for the budget and a *spreadsheet* that identifies expenditures and associated dollar amounts. (**February 10**, 15 points)

(4) <u>Budget Analysis:</u> From your District LCAP analyze a minimum of two expenditures. The analysis should include the context of why this expenditure is a priority, which students are impacted, the anticipated outcomes of this expenditure for students, and how the effectiveness of the expenditure will be measured. This assignment should be no more than two pages total. Please attach a copy of the expenditure as it appears in the District LCAP to your analysis. (**February 3**, 15 points)

(5) <u>Trends in School Finance Paper:</u> Using at least 5 references, write a 5 page paper on current trends in federal, state, and local school funding and include conclusions on how these trends affect your school or school district. Trends examined could include, but are not limited to; legislative mandates, collective bargaining, costs of benefits, and increasing/decreasing student enrollment. (**February 17**, 20 points)

(6) <u>LCAP Presentation:</u> In a group of no more than 4 create and deliver a presentation of no more than 30 minutes of a District's LCAP. The presentation should be designed for parents, students, and community members to better understand the Local Control Funding Formula (LCFF) and the funding priorities of the District's LCAP. The presentation should provide an opportunity for the District's community to provide input and feedback about the District's LCAP funding priorities. The presentation must include an interactive activity that requires class participation.(**February 24,** 25 points)

Course Objectives

Students will know and understand the impact of federal and state legislation on school finance. Students will research specific local school finance issues and understand how school districts spend and are held accountable for their budgets. Students will understand the direct impact of school finance decision making on students and student achievement.

Grading Scale (% of total points)

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)

SCHEDULE/COURSE OUTLINE

Class Meeting Date	Topics	To Do
January 20, 2015	Welcome & Introductions California School Finance Basics Historical Benchmarks, Legislation, & Court Rulings in California School Finance	**Bring a copy of your District's LCAP next week**
January 27, 2015	Trends in California School Finance: LCFF & LCAP School Funding Undergoes Major Reform Moving Forward Rising to the Challenge	*CE Presentations*
February 3, 2015	School District Revenue & Budgeting District Budget Trends Role of the Chief Business Official; School Budget Timelines & Budget Management Transportation, Maintenance, Food & Nutrition Services Navigating the State Budget	**Bring a copy of your District's Certificated Collective Bargaining Agreement (CBA) next week** *CE Presentations* *Budget Development Rubric & Budget Spreadsheet Due*
February 10, 2015	Collective Bargaining Agreements Charter Schools, Grant Funded Programs School Site Budgets & SACS	*CE Presentations* *Budget Analysis Due*
February 17, 2015	Special Education School Bonds Facilities Incidents of Fraud in Resource Allocation Practices	*CE Presentations* *Trends Paper Due*
February 24, 2015	*LCAP presentations*	*LCAP presentations*

www.cbp.org

California Budget Project serves as a resource of the media policymakers and state and local constituency groups who rely on CBP for accurate information and analysis of a range of state policy issues

www.edsource.org

EdSource is an independent, nonpartisan, not-for-profit organization whose mission is to clarify complex education issues and to promote thoughtful policy decisions about public school improvement.

http://fcmat.org

The mission of the Fiscal Crisis and Management Assistance Team is to help California's local educational agencies fulfill their financial and management responsibilities by providing fiscal advice, management assistance, training and other related school business services.

www.ppic.org

Public Policy Institute of California is a private nonprofit organization dedicated to independent objective nonpartisan research of California's economic social and political issues

https://www.sscal.com
School Services of California is a business, financial, management, and advocacy resource for educational agencies in California

www.wested.org
WestEd is a nonprofit research development administrative service agency that is part of the federal government's Regional Education Laboratories Network (REL Network). They provide technical assistance on research development planning and evaluation on education issues

Moving Forward: Addressing Inequities in School Finance through the Governor's Local Control Funding Formula

http://www.cbp.org/pdfs/2013/130509_MovingForward.pdf

Navigating the State Budget Process

http://www.cbp.org/pdfs/2014/141210_Budget_Process_infographic.pdf

Rising to the Challenge: Why Greater Investment in K-12 Education Matters for California's Students

http://www.cbp.org/pdfs/2013/131003_Rising_to_the_Challenge_SFF.pdf

School Funding Undergoes Major Reform – An Edsource Guide
http://edsource.org/wp-content/publications/10-questions.pdf?q=10-questions.html