

# California State University San Marcos College of Education

EDAD 616 B – Resource Allocation- 2 units  
Spring Semester 2011  
CRN# 21027

**Professor:** Dr. John A. Roach  
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**Meeting time:** Tuesdays 4:30 to 9:00  
4/12 – 5/10 in UH 442  
**Office Hours:** By appointment

## **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 with disabilities who require reasonable accommodations must be approved for services by providing appropriate and recent documentation to the Office of Disable Student Services (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.

**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.

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.

**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 identified in the course assignments section and will be described in class.

**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 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. Become knowledgeable about budget expenditures, classifications, object codes in order to understand how to designate resources.
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 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, carryover, etc.
11. Understand how technology is used for building, monitoring, and implementing budgets and accounting systems.
12. Learn how to align 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**

- Townley, A. , and Schmieder, J. (2008) . *School finance: A California perspective, 8<sup>th</sup> edition*. Dubuque, Iowa: Kendall Hunt Publishing. ISBN: 9760757550072
- Recommended websites and current events
- Documents from your district:
  - District and site budget
  - Collective bargaining agreements
- Handouts provided in class

### **ASSIGNMENTS AND GRADING:**

- (1) Preparation: Read all assignments and come to class prepared to participate in a discussion. (On going, 10 points)
- (2) Quizzes: Quizzes will be based on the textbook and the CD (Ongoing, 15 points)
- (3) Student Presentations: Group presentation as an expert in the PLC model, choosing from current financial topics. (Per sign up, 10 points)
- (4) Analysis of School Budget: Write a two page analysis of two school budgets, including your site's SPSA and either the PTO, a recent grant, the faculty social committee budget., ASB, or a budget you propose. (Due 3/1, 15 points)
- (5) EXCEL: You will create a budget using Excel. This will include a decision making rubric to reduce spending, if needed. (Due 3/15, 15 points)
- (6) Written Paper: Using at least 5 respected references, write a 5-7 page double spaced paper on the current trends in federal, state, and local funding and how that has affected your school and district. Include legislative changes, collective bargaining changes, costs of materials and energy, and trends in student enrollment as examples to draw your conclusions. Attach a 2009-2010 and a 2008-09 school budget as an appendix to show how your conclusions are reflected on a spread sheet. (Due 4/12, 20 points)

- (7) District Financial Brochure: Create a public information brochure of your district's financial picture. Include total district budget, ADA per student, categorical funding available, special grants that support programs or schools, outside fundraising by parents or an educational foundation, and average costs for teacher salaries, admin salaries, etc. You can use graphs, charts, or narrative to explain your data. Add photos of the school sites, the Superintendent's photo, or other significant artifacts to make the brochure a complete package. (Due 5/03, 15 points)

**REQUIREMENTS:**

1. Demonstrate knowledge and competence in the stated objectives.
2. Complete the assigned reading; participate in class activities and discussions.
3. Bring in current documents from the site and samples of budgets.
4. Prepare a budget using EXCEL and demonstrate its use as a tool for monitoring expenditures.
5. Students will report as a group on a topic where they have expertise or curiosity relevant to school finance. Each group will make a presentation highlighting the key issues and the impact on schools. Examples of topics:
  - Basic Revenue Limit vs. Basic Aid Funding
  - PTA funding
  - Sports/ASB, ACLU Lawsuit
  - IDEA
  - Title I funding
  - PTA funds
  - Textbook Adoptions
  - Declining enrollment
6. Complete the course writing requirement
7. Complete an informational brochure of the student's current district financial resources.

**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)

# Instructional Timeline for EDAD 616B

## Resource Allocation, Spring 2011

Date	Topic	Assignment Due
4/12	Introductions/Class Structure The Basics of School Finance in California  Historical Benchmarks, Legislation and Court Rulings in CA School Finance	Townley, Chapters 1, 2
4-19	Trends in California School Finance  Class Size, Charter Schools, Special Ed, Facilities, Etc.  Role of the Chief Business Officer and Managing the Budget	Current Events, PLC 1 & 2  Townley, Chapter 3, 4 and 5 <u>Budget analysis due</u>  Quiz
4/26	Collective Bargaining Agreements and Staffing  School District Revenue and Budgeting	Bring current district contract <u>Excel budget due</u>  Townley, Chapters 6, 7 PLC 3, 4, 5
5/3	Site Budgets  Equity Audits Pitfalls in Resource Allocation Practices School bonds, Trans, Construction	Townley, Chapters 8, 9, and 10 Site SPSA <u>Written paper due</u> PLC 6, quiz  (Work on brochure) PLC 7
5/10	Transportation, Maintenance, and Food Services, etc  Final Celebration	Townley, Chapters 11, 12, 13, and 14 <u>Brochure due</u> , quiz  TBA