

Course & Section Nos.	EDAD 616B, Section 1
Course Title	School Finance and Resource Allocation
Class Roster No.	22182
Course Day(s)	Tuesdays January 24 through February 28
Time	4:30 pm – 9:00 pm
Course Location	San Marcos Elementary School
Semester / Year	Spring 2017
Instructor	Dr. Michael Grove
Phone	760-846-6636
E-Mail	mgrove@csusm.edu
Office	N/A
Office 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

This course addresses the candidate's ability to understand, align, effectively manage, and integrate all the organizational structures, processes, and policies of a school system that impact the school's ability to achieve its vision and goals. These skills include an understanding of the regulatory and financial contexts involved with the management of human, fiscal and material resources to distribute equitably in support of all students' learning.

Course Prerequisites

None

Course Outcomes

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.

Credit Hour Policy Statement

Per the University Credit Hour Policy, this course requires that students are expected to spend a minimum of two hours outside of the classroom each week for each unit of credit engaged in learning.

REQUIRED TEXTS, MATERIALS & ACCOUNTS

Required Texts

No Required Text.

Course Materials

All course materials are available via Cougar Courses. Students will be required to access materials and submit assignments via Cougar Courses.

COURSE & PROGRAM STUDENT LEARNING OUTCOMES

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. Candidates successfully completing this program receive a credential with authorization 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 dispositions following the Preliminary Administrative Services Credential Program Standards

CAPE 11: Identifying and Using Available Human, Fiscal, and Material Resources to Implement the School Growth Plan.

The principal is knowledgeable about a wide range of resources to help implement the school growth plan, including but not limited to human, fiscal, and material resources. The principal identifies and seeks additional resources as needed from a variety of sources both within and outside of the local community to support the implementation of the school growth plan.

CAPE 17: Developing, Implementing, and Monitoring the School's Budget

The principal understands school finance in California, including relevant laws and regulations. The principal works collaboratively with others in the school community to develop, implement and monitor the school's budget and expenditures, and reports accurate and timely fiscal information to the LEA and the school community. The principal prioritizes the use of school resources, including the budget, to support the school's vision, goals, and growth plan. The principal understands financial record keeping and accounting processes, and the use of current technologies for financial management and business procedures.

Expected Dispositions for the Education Profession

Education is a profession that has, at its core, certain dispositional attributes that must be acquired and developed. Teaching and working 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 that must be evident in teacher candidates: social justice and equity, collaboration, critical thinking, professional ethics, reflective teaching and learning, and life-long learning. These dispositions have observable actions that will be assessed throughout the preparation program. 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 Teaching Performance Expectation 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 following assignments:

- District Budget Snapshot Brochure
- LCAP Workshop Presentation
- Site Budget Budget Development Assignment
- Learning Goals Assignment
- Learning Goals Reflection

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 assignments must be original work, clear and error-free. All ideas/material 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 accordingly.

Academic Honesty and Integrity: Students are responsible for honest completion and representation of their work. Your course catalog details the ethical standards and penalties for infractions. There will be zero 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.

Refer to the full Academic Honesty Policy at:

http://www.csusm.edu/policies/active/documents/Academic_Honesty_Policy.html

Plagiarism

As an educator, it is expected that each candidate (course participant) 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.

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 EDAD 616B 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.

Assignments (230 Total Points Possible)

Assignment/Item	Format	Points Possible	Due Date
Attendance and Participation	Individual	5 points weekly - 30 points total	Weekly
School Finance Topic Presentation	Individual	20	Jan. 24, 2017
Learning Goals Assignment	Individual	15	Jan. 31, 2017
District Budget Snapshot Brochure	Individual	50	Feb. 7, 2017
LCAP Workshop	Group	50	Feb. 28, 2017
Site Budget Development Assignment	Individual	50	Feb. 28, 2017
Learning Goals Reflection	Individual	15	March 7, 2017

Late Work Policy

Assignments submitted after the due date will incur a penalty of 2 points per day. Late assignments may not be resubmitted for an improved grade without the prior approval of the instructor.

Final Exam

There will be no Final Exam for this course.

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)

COURSE OUTLINE

Class Meeting Date	Topics	Assignments/Prep
Jan. 24, 2017	<ul style="list-style-type: none"> ● Welcome & Introductions ● Review of syllabus & assignments ● California School Finance Basics <ul style="list-style-type: none"> ○ School Finance Topic Presentations 	<ul style="list-style-type: none"> ● Learning Goals Assignment ● School Finance Topic Presentations due ● Start District Budget Snapshot Brochure
Jan. 31, 2017	<ul style="list-style-type: none"> ● LCFF ● Role of CBO & Business Office ● Process of building & monitoring district budget ● Reading & analyzing budget documents ● Standardized Accounting Code Structure (SACS) ● Relationship between LCFF & LCAP 	<ul style="list-style-type: none"> ● Bring 2015-16 Final Budget Summary & 2016-17 Adopted Budget Summary ● Bring a copy of your district's LCAP ● Start LCAP Workshop Assignment
Feb. 7, 2017	<ul style="list-style-type: none"> ● School site budgets: <ul style="list-style-type: none"> ○ Building ○ Analyzing ○ Monitoring ● SPSA & budgeting ● District Budget Snapshot presentations 	<ul style="list-style-type: none"> ● District Budget Snapshot Brochure due - bring 4 copies to class. ● Be prepared to record & upload video of your Snapshot presentation ● Start Site Budget Development Assignment
Feb. 14, 2017	<ul style="list-style-type: none"> ● Collaborative work on LCAP workshops 	
Feb. 21, 2017	<ul style="list-style-type: none"> ● ASB/Student Funds ● School Bonds/Facilities ● Transportation, Maintenance, & Food Services ● Student fees ● The role of parent organizations in school budgets 	
Feb. 28, 2017	<ul style="list-style-type: none"> ● LCAP Workshops Presentations ● Reflection Assignment 	<ul style="list-style-type: none"> ● LCAP Workshops due ● Site Budget Development Assignment due ● Start Reflection Assignment