

Course & Section Nos.	EDAD 616B (XXX) 33XXX
Course Title	School Finance and Resource Allocation
Class Roster No.	
Course Day(s)	5 week course, 2 units
Time	Asynchronous
Course Location	Online
Semester / Year	Summer One 2021
Instructor	Bill Billingsley, M.A., CPA
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Office	Online
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 outcome

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

Admission to the program.

Course Objectives

The course objectives, assignments, student learning outcomes, and assessments have been aligned with the following CCTC standards:

The course learning outcomes have been aligned with the Commission for Teachers Credentialing standards for a Preliminary Administrative Services Credential. This course is designed for teachers to gain skills, knowledge, and attitudes necessary to work in schools and districts in implementing effective programs. The successful candidate will be able to merge theory and practice in order to realize a comprehensive and extensive educational program for all students. Candidates are required to formally match alignment in assignments and outcomes with the following California Administrators Performance Expectations (CAPE) Leadership Standards as follows:

CAPE 4: 2A: Personal and Professional Learning

New administrators recognize that professional growth is an essential part of the shared vision to continuously improve the school, staff, student learning, and student safety and well-being. During preliminary preparation, aspiring administrators learn how to:

1. Use the California Standards for the Teaching Profession (CSTP) for teachers and the CAPEs and CPSEL for administrators to describe and set expectations for growth and performance for staff and for themselves.
2. Involve staff in identifying areas of professional strength and development that link to accomplishing the school's vision and goals to improve instruction and student learning.
3. Assist staff in developing personalized professional growth plans, based on state-adopted standards that identify differentiated activities and outcomes for individual and collaborative learning based on the CSTP, CAPEs, and CPSEL.
4. Use resources to support evidence-based practices that staff can apply to solve school-level problems of practice.

CAPE 8: 3A: Operations and Resource Management

New administrators know that day-to-day and long-term management strategies are a foundation for staff and student health, safety, academic learning, and well-being. During preliminary preparation, aspiring administrators learn how to:

1. Manage the interrelationships within the network of school operations; instructional programs; student services; and material, fiscal, and human resources.
2. Develop a plan to engage staff and other stakeholders in establishing routines and procedures for monitoring facilities, operations, and resource acquisition and distribution that help maintain a focus on access to learning opportunities and resources and positive outcomes for all students.
3. Follow regulations related to accessibility of the physical plant, grounds, classes, materials, and equipment for staff and students.
4. Use technology to facilitate communication, manage information, enhance collaboration, and support effective management of the school. Handle confidential matters relating to students and staff in a manner consistent with legal practices and ethical principles.

CAPE 10: 3C: Managing the School Budget

New administrators know the school's budget and how the budget supports student and site needs. During preliminary preparation, aspiring administrators learn how to:

1. Apply foundational laws and regulations pertaining to California school finance, federal and state program funding, and local allocations.
2. Assess and analyze student and site needs and use this understanding as a base to support financial decision-making and efforts to prioritize expenditures that support the school's vision, goals, and improvement plans.
3. Use various technologies related to financial management and business procedures.
4. Collaborate with finance office staff and other stakeholders, as appropriate, to understand, monitor, and report in a clear and transparent manner the school's budget and expenditures including financial record keeping and accounting.

CAPE 15: 5C: Ethical Action

New administrators understand that how they carry out professional obligations and responsibilities affects the entire school community. During preliminary preparation, aspiring administrators learn how to:

1. Apply policies and practices that both support student learning and protect the rights and confidentiality of students, families, and staff.
2. Act with integrity, fairness, and justice and intervene appropriately so that all members of the school community are treated equitably and with dignity and respect.
3. Use personal and professional ethics as a foundation for communicating the rationale for their actions.

Unique Course Requirements

None.

Required Texts

School Finance: A California Perspective, 11th Edition

And, see list of resources below.

Resources

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

www.wested.org<http://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

School Funding Undergoes Major Reform, An Edsource Guide

<http://edsource.org/wp-content/publications/10-questions.pdf?q=10-questions.html><http://edsource.org/wp-content/publications/10-questions.pdf?q=10-questions.html>

Course Learning Outcomes (CLO)

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.

Administrator Performance Assessment

Beginning July 1, 2018, all California Preliminary Services Credential candidates must successfully complete a state approved Administrative Performance Assessment (CalAPA). For more information please visit: http://www.ctcpa.nesinc.com/TestView.aspx?f=HTML_FRAG/CalAPA_TestPage.html

ED ADMIN Program Student Learning Outcomes (PSLO)

Students graduating with a Master of Arts in Educational Administration will master the following outcomes:

1. Explain how school plans, programs, and activities support the school's vision to advance the academic, linguistic, cultural, aesthetic, social-emotional, behavioral, and physical development of each student.
2. Recognize discriminatory practices, signs of trauma, manifestations of mental illness, and promote culturally responsive, positive and restorative strategies to address diverse student and school needs.
3. Use principles of positive behavior interventions, conflict resolution, and restorative justice and explain to staff and community members how these approaches support academic achievement, safety, and well-being for all students.
4. Engage family and community members in accomplishing the school's vision of equitable schooling and continuous improvement that includes the academic, linguistic, cultural, social-emotional, mental and physical health, and/or other supports needed to succeed in school.
5. Recognize any possible institutional barriers to student and staff learning and use strategies that overcome barriers that derive from economic, social-emotional, racial, linguistic, cultural, physical, gender, gender identity, sexual orientation, or other sources of educational disadvantage or discrimination.
6. Understand and analyze governance and policy systems and use this knowledge to explain roles and relationships of school and district administrators, local state boards of education, and the legislature to staff and the school community.
7. Analyze current research literature and explain how findings can be applied in a practical educational setting.

SCHEDULE/COURSE OUTLINE

Deadline	Overview	View	Read	Do
Module 1 Sunday 11:59pm	Understanding school finance legal and policy historical context; observe and analyze California State Board of Education fiscal meeting agenda items. Understanding the Local Control Funding Formula (LCFF) and the Local Control and Accountability Plan (LCAP); review, analyze and post link to your local district's LCAP		Read Chapters 2 and 3 of <i>School Finance A California Perspective</i> pages 15-43 (28 pages). Read LCFF: An Essential EdSource Guide https://edsource.org/wp-content/publications/10-questions.pdf?q=10-questions.html and CDE's LCFF Guide Overview: http://www.cde.ca.gov/fq/aa/lc/ (PowerPoint slides also available)	DUE 6/6/21 Assignment #1 DUE 6/6/21 Assignment #2 (Note: also schedule interview with your principal, supervisor, District, County level, or board. Not due until <u>Module 5 (7/3/21)</u> .
Module 2 Sunday 11:59pm	Understanding current fiscal events in California TK-12 education; understanding historical context for school reform. Understanding the link between school reform, teaching and learning, and fiscal implications and connect it to a current event.	View four resources in Course Syllabus that align to your current research interests. View four new resources from the Course Syllabus that align to your current research interests.	Read Chapter 5 of <i>School Finance A California Perspective</i> pages 59-69 (10 pages). Read Chapter 6 of <i>School Finance A California Perspective</i> pages 71-81 (10 pages).	DUE 6/13/21 Assignment #3
Module 3 Sunday 11:59pm	Understanding school unions and collect bargaining through a fiscal lens for educational leaders.	View and post district's Certificated Collective Bargaining Agreement (CBA)	Chapter 4 of <i>California School Law, Unions and Collective Bargaining</i> , pages 133-167 (34 pages). Please Note: This is NOT required reading, only if you currently have access to this text.	DUE 6/20/21 Assignment #4

Deadline	Overview	View	Read	Do
Module 4 Sunday 11:59pm	Understanding the budget in order to communicate information to parents, students, teachers, and other community educational stakeholders.	Review sample school budget (PDF) and budget detail (PDF) uploaded to Moodle And Review the sources of state and federal education funding in California here: http://www.cde.ca.gov/fg/fr/eb/cefedbudget.asp	FICMAT Oversight Guide (65 pages): https://www.fcmat.org/PublicationsReports/Fiscal_Oversight_Guide_final_11-8-2019.pdf Your School Budget: https://www.sandiegounified.org/your-school-budget	DUE 6/27/20 Assignment #5
Module 5 Saturday Last Class 11:59pm	Understanding fiscal policies, procedures, and budgeting from a theory-to-practice example through an administrator interview.	Review school's budget, district budget, or LCAP from previous modules to formulate interview questions.	Read Chapter 4 of <i>School Finance A California Perspective</i> pages 47-57 (10 pages).	DUE 7/3/20 Assignment #6

COURSE REQUIREMENTS AND GRADED COURSE COMPONENTS

Course Assignments

Assignment #1 (10 points):

Please locate and review one of your District's 2020 or 2021 published Governing Board Agenda Minutes items relating to fiscal/business services. Please write and post a response citing this week's reading and board documents answering the following questions using specific references:

- 1) *What is the main point of the business services agenda item you chose to review?*
- 2) *Did the Board agenda minutes reveal any Board Member discussion relating to the fiscal agenda item?*
- 3) *What are the connections between the agenda item/board discussion and your current job position and/or any of this week's readings?*
- 4) Please include at least two connection between the board agenda item you reviewed and what you read in the text book about equity, adequacy, and school finance.

Assignment #2 (10 points):

(Schedule interview with your principal, supervisor, district Assistant Superintendent of Business Services due July 3, 2021 last day of class.)

Please locate and review your district's LCAP. Please write and post a response citing this week's reading and your own district's LCAP answering the following questions using specific references:

- 1) *What are the 8 State priorities required in all LCAPs?*
- 2) *What are two major goals highlighted in your district's LCAP?*
- 3) *How are parent and community voices included in the LCAP process?*
- 4) *In your District, where is the majority of funding being allocated to for the upcoming school year?*
- 5) *How does your district's LCAP address services for underserved students and families?*

Assignment #3 (20 points):

Review four school resources from the listing/links provided in the course syllabus or others resources you have located which align with your current research interests. Also, read Chapters 5 "Managing the Budget" and Chapter 6 "School District Revenue." Post a response citing those four resources, information you've gleaned from the text book readings to answer the following questions using specific references:

- 1) *Describe two salient changes made to school funding made in the past 10 years?*
- 2) *Describe the difference between the LCAP and the LCFF, and describe how these new funding formulas have changed how schools receive funding?*
- 3) *As a future school site principal, it is important that you can identify how the LCAP and LCFF funding has impacted both your school site and your District. Overall, has you District revenue increased or decreased with the LCFF/LCAP funding model?*

Assignment #4 (20 points):

Review your district Collective Bargaining Agreement (CBA), read PDF regarding school unions and collective bargaining, and post the CBA to your assignment. Post (at least) a response citing those two resources while answering the following questions using specific references:

- 1) *What is the purpose of the CBA?*
- 2) *What specific timely requirements are stated? How often can the CBA change?*
- 3) *How is the CBA enforced? Who are the key school and district personnel involved in the collective bargaining process?*
- 4) *What are the salient fiscal implications of this agreement and others similar to it?*
- 5) *How is student, teacher, and public voice integrated into the collective bargaining process?*

Assignment #5 (20 points):

You have been asked to present to your site’s School Site Council (SSC) at an upcoming meeting. Your topic is to explain how K-12 education is funded from the both state and federal level. Please draft a narrative to explain the funding components. Many of the SSC members are parents who may have only a basic understanding of this topic so a clear, acronym free explanation is required in your narrative.

	Distinguished (20-18)	Proficient (17-15)	Basic (14-11)	Unsatisfactory (10-1)
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Assignment #6 (20 points):

Reviewing what you have learned in assignments 1-5, interview a principal, or preferably your district’s chief business official (Assistant Superintendent of Business Services), regarding the school’s or district’s budget. Sample questions may include:

1. *What is your role in budget development?*
2. *How is the budget development process transparent for all stakeholders?*
3. *How is the budget monitored after it is approved?*
4. *How is the site or district budget aligned to the district’s LCAP?*
5. *What advice would you provide to new educational leaders as they enter into assistant principal, principal, and other key school leadership positions relating to the site or district budget process?*
6. *Other questions you feel are appropriate or you’d like more information about?*
7. Post at least a 700 word summary of the interview including main points discussed, key information learned, and one area of alignment to a reading from any module. Make sure to include citations as necessary.

Grading Standards

- 93-100% = A
- 90-92% = A-
- 87-89% = B+
- 83-87% = B
- 80-82% = B-
- Below 80% = C or below

Final Exam Statement

There will be no final exam.

School of Education/Course Attendance Policy

Due to the dynamic and interactive nature of courses in the School of Education, all candidates (course participants) are expected to attend all classes and participate actively. At a minimum, candidates (course participants) 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 candidate (course participants) have extenuating circumstances, s/he should contact the instructor as soon as possible. *(Adopted by the COE Governance Community, December, 1997).*

Policy on Late/Missed Work

Late work will not be accepted unless previously approved by instructor.

MECHANICS	Uses complete sentences, organization is clear and appropriate, tone is professional and respectful, and the posting/final assignment is free of mechanical errors (grammar, spelling, usage) that might impede reader understanding.	Uses complete sentences, organization is evident, tone is appropriate, and the posting/final assignment includes no more than one mechanical error (grammar, spelling, usage) per paragraph that might impede reader understanding.	Uses mostly complete sentences, organization could be improved to present a more coherent message, tone is inconsistent but generally appropriate, and the posting includes 2-3 mechanical errors (grammar, spelling, usage) per paragraph that impede reader understanding.	Uses incomplete sentences, organization is unstructured, tone is inappropriate, and the posting/final assignment includes numerous errors in mechanics (grammar, spelling, usage) in each paragraph, which render the posting difficult to read and/or understand.
CONTENT	Demonstrates a strong understanding of the concepts, topics, and ideas under discussion, as evidenced by thoughtful and thorough responses and questions that show a clear connection with the course material. The posting/final assignment shows depth of analysis, and includes detailed rationales and/or evidence.	Demonstrates an adequate understanding of the concepts, topics, and ideas under discussion, as evidenced by posting clear statements in the forum/in final assignment. Includes a few details in the posting.	Demonstrates a limited understanding of the concepts, topics, and ideas under discussion, as evidenced by posting information that could be derived from prior posts and/or including highly general comments/in final assignment.	Writes a general or superficial posting/final assignment that is unrelated to the discussion at hand and/or posts no comments/turns in no assignment.

ASSIGNMENT GRADING RUBRIC: GENERAL CONSIDERATIONS

GENERAL CONSIDERATIONS

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.

Students with Disabilities Requiring Reasonable Accommodations

Students with disabilities who require reasonable accommodations must seek approval for services by providing appropriate and recent documentation to the be approved for services by providing appropriate and recent documentation to the Office of Disability Support Services(DSS). This office is located in Craven Hall 4300, and can be contacted by phone at (760) 750-4905. Students authorized by DSS to receive reasonable accommodations should meet with their instructor during office hours or make an appointment.

Credit Hour Policy Statement

Students should plan to read required assignments in articles attached to the course shell or in the required textbook, respond in writing to assignments in a public forum, collaborate with peers and the instructor, participate in mandatory live Zoom sessions, and complete assignments and projects as outlined in the syllabus and the Cougar Course Shell. Students are expected to devote a minimum of 45 hours for each unit of credit in fully online ED ADMIN courses like EDAD 616B.

All University Writing Requirement

The All-University Writing Requirement of 1700 words for a 2-unit course, is satisfied through assignments.

Necessary Technical Competency Required of Students

This course requires technical competencies which require the use of: Moodle, ZOOM, Word, Excel, Google Docs, Google Sheets, and researching topics on the internet.

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:

- 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?

In addition, 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.