

**KREMEN SCHOOL OF EDUCATION AND HUMAN DEVELOPMENT
DOCTORAL PROGRAM IN EDUCATIONAL LEADERSHIP**

EDL 280T: Resource Management & Fiscal Analysis

REVISED SYLLABUS

Fall Semester, 2010

Tuesday, 4:00-7:00

Room 444

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Course Description:

Examination of the acquisition, distribution and management of fiscal, human and time resources in public education. Identification of the tools necessary for developing and enhancing financial resources that leads to the goals and aims of an individual school or district.

Student Learning Objectives:

By the end of the semester, students will be able to:

- Demonstrate an understanding of issues in school finance equity.
- Demonstrate an understanding of the history of school finance in the United States and California.
- Identify financial resource management problems in relation to legal and ethical issues.
- Develop a plan for the deployment and alignment of financial and human resources that enhance student achievement.
- Understand the impact of collective bargaining on school district budgeting and managing financial resources.
- Develop a positive employer-employee relationship through involvement in the allocation of financial and human resources
- Demonstrate an understanding of the budget development, deployment and administration process and its impact on the operation of an organization.
- Develop resource and fiscal plans that support an effective and safe learning environment.
- Demonstrate an understanding of the available financial resources available to school districts and the laws/regulations associated with said resources.
- Understand the importance and contributions of fiscal control processes (planning, budgeting, information systems, etc.) to the attainment of school/school district organizational goals and objectives.

- Conduct an evaluation of the allocation of resources on the operation and success of the school/school district.
- Demonstrate ability to access, analyze, evaluate and report on current literature in the area of financial resources.

General Statements:

Students with special needs addressed by the American Disabilities Act who need course materials in alternative modes should notify the instructor and immediate reasonable efforts will be made to accommodate those special needs.

Further information on policies regarding plagiarism, cheating, sexual harassment and student conduct can be found in the University Catalog and the Schedule of Courses.

In the interest of safety, students are advised to leave the building in groups. University Security escorts are available by calling 278-2132.

Required Texts and Readings:

- Guthrie, J. W., Springer, M. G., Rolle, R. A., & Houck, E. A. (2007) *Modern Education Finance and Policy*. Boston, MA: Pearson Education, Inc. (order at www.amazon (prices start at \$72.47 new and \$54.85 used)
- *Selected Readings on California School Finance*. (2010) Mountain View, CA: EdSource, Inc. (order at www.edsource.org (hard copy, \$50.00; e-textbook, \$30.00)

Grading Policy:

- *In-Class Participation (20 Percent)*—in-class participation is important. Each week students will have the opportunity to engage in active class participation in both group work and class debates. Students are expected to be prepared to engage in discussions related to the weekly readings.
- *Presentation of Assigned Readings (20 Percent)*—each student will be required to lead discussions on readings that will be assigned during the August 30 class. The student will be required to:
 - Provide a written outline of the assigned chapter/reading by providing each student in the class with a hard copy or posting the outline on “blackboard.”
 - Provide an in-class overview of the contents of the chapter/reading.
 - Facilitate an in-class discussion based on the chapter/reading.
- *Case Study Analysis (20 Percent)*—The Guthrie textbook contains five (5) case studies in Chapter One. Each student will be assigned to a team that will select one of the case studies for review, analysis and evaluation. Using practical experience and knowledge gained for a

review of the literature, respond to the discussion questions at the end of each case study. Case studies will be assigned on August 31.

Each team shall prepare a written report of approximately five (5) pages with sufficient references to defend your argument. **Each team must be prepared to present and defend their paper in class on October 12.**

- *Final Project (40 Percent)*—The final assignment will be a team project that will provide your group with an opportunity to familiarize yourself with the relationship of the major divisions/ departments (you must select at least 2) of a selected unified school district and the role the divisions/departments played in the development of the District's 2010-11 General Fund budget. One of the divisions/departments must include the Business Division/Department. Preferably we will be able to select a rural (small), suburban (fairly large) and urban school district. The report shall be divided into the following three major areas:

➤ **Overview of the District**

The assignment will include an overview of the school district that highlights issues unique to the selected school district. The report will also include information on each of the selected divisions/departments and the major characteristics and responsibilities of each selected department. In addition, the paper will provide a narrative of the Team's assessment of the selected divisions/departments and their individual impact of the school district. Further, the paper will provide a summary of the demographics of the District including enrollment, ADA, social/economic and ethnic make-up of the student population, results of the most recent STAR test including District API and AYP information.

➤ **Review of the School District Budget for 2010-11**

This section of the report will include a review of the District's 2010-11 Budget including but not limited the following components:

- ✓ The total General Fund Budget
- ✓ The total of all other funds operated by the District (Adult, Child Development, Food Services, Deferred Maintenance, Building Funds, etc.)
- ✓ Summary of the General Fund budget reductions for 2010-11 that had to be made because of reductions in State funding.
- ✓ The process used by the District in arriving at the General Fund reductions.
- ✓ The role the Business Office and the other Division/Department played in the determination of the budget reductions.
- ✓ The perceived impact the budget reductions will have on the operation of the District including the instructional and non-instructional programs.
- ✓ The District's certification (positive, qualified, negative) of the General Fund budget as approved by the Governing Board and certified by the County Office of Education.

➤ **Commendations and Recommendations**

Based on our class discussions and readings, the final component of the paper will include the commendations and recommendations of your team on each of divisions/departments selected for your study related to their working relationship and the role each division/department played in the development of the 2010-11 General Fund budget.

Each group will present their report to the entire class during the **December 7** class session. The team will determine the format for the report (written text, PowerPoint, etc.) and the type of presentation you will make to the class. Each member of the team must have a role in the class presentation.

The intent of this assignment is to provide you with the opportunity to apply the information covered in this course to assess the impact General Fund resources have on the instructional and non-instructional operation of school districts as well the role the business department/division and the other division/department you selected had in the development and corresponding budget reductions that had to be implemented in 2010-11.

Be prepared to select your groups and school districts at the **August 31** class meeting. Additional information on this assignment will be provided you at the August 31 class meeting including the procedures to follow in obtaining approval from the school district you select for your study.

Tentative Class Session Topics, Assigned Readings and Assignment Due Dates. Topics, Readings and Assignments starting with the October 7 class will be determined later

Date	Topic	Readings/Assignments Due
8/24	Course Overview Review of Syllabus Class Expectations Course Introduction Predictors of School District Instability Impact of California Budget on Education	Bradley Presentation Bradley Presentation
8/31	Discussion of August 24 Assignment on School District Revenue Limits Education Finance Challenges Confronting Educators (Case Studies) An Overview—Public Schools in California Assignments for Semester: • Case Studies from Chapter 1 (2 students per case study.) See 3 rd item under grading policy • Presentation of Assigned Readings (each student will be assigned one chapter reading to lead discussion during class (see 2 nd item under	Calculation of School District Revenue Limits for 2009-10 (revenue limit report and graph) Guthrie, Chapter 1 Ed Source, Chapter 1 Guthrie, Chapter 1 Guthrie, Chapter 3, 5, 7, 8, 10, 11

	grading policy)	<p>Revenues and Revenue Limits, Chapter 1 and 2</p> <p>Selected Readings on California School Finance,</p> <ul style="list-style-type: none"> • Chapter 2 (all readings) • Chapter 3 (augmented by 2010-11 State Budget) • Chapter 4 (all readings) • Chapter 5 (both readings) • Chapter 6 (both readings) • Chapter 7 (all students will read and be responsible to participate in class discussion)
9/7	<p>United States Educational Finance History</p> <p>Introduction to California School Finance</p>	<p>Guthrie, Chapter 3</p> <p>Revenues and Revenue Limits, Chapter 1</p>
9/14	No Class—Reading will be assigned by instructor	
9/21	<p>California System of Funding Schools</p> <p>The Impact of Proposition 98 on California School Finance</p>	<p>Ed Source (Chapter 2)</p> <p>Revenues & Revenue Limits, Chapter 2</p>
9/28	<p>The Impact of Court Decisions on Education Financing</p> <p>The California Budget</p>	<p>Guthrie, Chapter 5</p> <p>Ed Source (Chapter 3 augmented by discussion on 2010-11 State Budget)</p>
10/5	<p>Sources of Revenue for Education</p> <p>Fund Accounting and Sources of Revenue for California School Districts Including Alternative Revenue Resources</p> <p>Comparing California with Other States</p>	<p>Guthrie, Chapter 7</p> <p>Bradley Presentation</p> <p>Ed Source (Chapter 5 augmented by California Budget Project Report)</p>
10/12	Distributing Education Funds	Guthrie, Chapter 8

	General Fund Expenditure Reporting for California School Districts	Bradley Presentation
10/19	Team Reports on the Case Studies from Guthrie, Chapter 1 Budget Planning and Administration	See 3 rd Assignment under Grade Policy Guthrie, Chapter 10
10/26	District Budgeting The Development of the General Fund Budget for California School Districts	Ed Source (Chapter 4) Bradley Presentation on the Budgeting Process in California Public Schools
11/2	The Development of the General Fund Budget (continued) Development and Reporting of “Other” Fund Budgets	Bradley Presentation Bradley Presentation
11/9	Dealing with the Unprecedented Reduction in General Fund Resources for California Public Schools	Presentations by Leaders of Two Different School Districts
11/16	Managing Capital Facilities & Capital Facility Resources Financing Capital Facilities in California Public Schools	Guthrie (Chapter 11) Bradley Presentation
11/23	Concepts of Finance Reform Getting Down to Facts	Ed Source (Chapter 6) Ed Source (Chapter 7)
11/30	So You Want to be a District-Level Administrator and/or Superintendent	Bradley Presentation Along With Invited Guests
12/7	Team Presentations on School District Reports (Business Division/Department, 2 nd Division/Department and Budget Presentations)	See the “Final Project” assignment under Grading Policy
12/14	Final Culminating Activity	Individual Group Presentations (all Groups)

ADDITIONAL RESOURCES

- *Revenues and Revenue Limits*, (2009) Sacramento, CA: School Services of California, Inc.

WEB RESOURCES

- School Innovation & Advocacy, The Cabinet Report (obtain access from your school district)
- School Services of California, The Fiscal Report (obtain access from your school district)
- California Department of Education
- California School Finance
- Center On education Policy
- Center on Reinventing Public Education
- Child Trends DataBank
- Consortium for Policy Research in Education
- Ed-Data: CA K-12 Schools
- Ed Source
- Education Commission of the States
- Education Week
- Educational Leadership Journal
- Educational Policy Analysis Archives
- Fiscal & Crisis Management Assistance Team (FCMAT)
- Public Policy Institute of California
- U. S. Department of Education