

College of Education
Education Doctorate in Educational Leadership
EDAM732 Fiscal Planning and Facilities Management
Course Syllabus
(5 units)

Course Title and Number: Fiscal Planning and Facilities Management, EADM 732

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Year/Quarter: 2015, Spring

Time/Days/Room: 8:00 AM-11:50 AM, Saturdays (April 4-June 13, 2015), CE - 209

Wise Reflective Educator Statement

The College of Education of California State University, San Bernardino (CSUSB) is dedicated to the development and support of wise, reflective professional educators who will work toward a just and diverse society that embraces democratic principles. The wise teacher:

- Possesses rich subject matter knowledge.
- Uses sound pedagogical judgment to professional practice and conduct.
- Has practical knowledge of context and culture.
- Acknowledges the relativism associated with variations in the values and priorities of both their peers and their students.
- Is comfortable with the uncertainties of the outcomes of instructional decisions.

(College of Education *Conceptual Framework, 2006 and augmented 2008*)

Program Objectives and Student Learning Objectives

The following list is extracted from the full list of Student Learning Objectives and identifies the alignment of Student Learning Objectives and Student Indicators addressed.

Student Learning Objective:

Effective communicators and collaborators

Student Indicators:

- a. Demonstrates open communication with stakeholders.
- b. Demonstrates communication in a timely fashion with consultants.
- c. Demonstrates collaborative communication with all public agencies.
- d. Develops positive, meaningful and sustaining relationships with all constituents.

Student Learning Objective:

Leaders who recognize, celebrate, and acknowledge the contributions of all individuals.

Student Indicators:

- a. Is knowledgeable of their own mental models.
- b. Develops healthy organizational cultures in which all individuals are valued.
- c. Advocates for personal practices that are equitable.
- d. Is knowledgeable of public policy and local policy and law that supports equal opportunity.

Student Learning Objective:

Leaders who are fiscally responsible and accountable.

Student Indicators:

- a. Demonstrates fiscal responsibility in managing financial resources.
- b. Is accountable for the effectiveness of the instructional program.
- c. Is knowledgeable of the governance structure and applicable federal, state, and local laws.

Catalog Description

EADM 732: Fiscal Planning and Facilities Management – Methods of financing public education. Identifies budgeting and accounting techniques used by school districts in support of the instructional process and considers legal requirements and public relations to the financing of education and resource allocation to achieve student outcomes. Explores facilities issues. Four hours lecture and two hours practicum.

Course Goals/Objectives**School Finance**

Understand school finance at the state and local levels – terminology and applications – K-12, CC, CSU, UC

Investigate school finance reform efforts

Demonstrate the concepts of adequacy and equity in response to the questions, “*How Does California Rank?*” and “*How Much Is Enough?*”

Budgeting

Understand school district/college and local budgeting components

Investigate reform efforts through accountability standards

Study site/campus level budget development that includes measures to ensure goal, program and student achievement/improvement

Facilities

Understand the components of a Facilities Master Plan

Comprehend the criteria regarding school/campus site acquisition

Appreciate the complexities of funding options for school/campus facility construction

Further Readings and Useful Websites

Educational Administration Quarterly
Educational Evaluation and Policy Analysis
Harvard Educational Review
Journal of Educational Finance
Journal of Educational Equity and Leadership
Journal of Human Resources

Further Readings

American Economic Review
American Educational Research Journal
American Journal of Education (formerly School Review)
Economics of Education Review
National Association of Secondary School Principals' Bulletin
Phi Delta Kappan
The Public Interest
Review of Educational Research
Teachers College Record

Useful Websites

American Association of School Administrators: www.aasa.org
American Education Finance Association: <http://ginie1.sched.pitt.edu/aeifa>
American Educational Research Association: www.aera.net
Association of California School Administrators: www.acsa.org
Association of School Business Officials International: asbointl.org
California Association of School Business Officials: www.casbo.org
California Basic Educational Data System: www.cde.ca.gov/demographics
C.A.S.H. California Coalition for Adequate School Housing: www.cashnet.org
California Department of Education: www.cde.ca.gov
California Department of Toxic Substances Control: www.dtsc.ca.gov/
CEQA California Environmental Quality Act: www.ceres.ca.gov/ceqa/
California Legislative Information: www.leginfo.ca.gov
California School Finance (Ed Source): www.californiaschoolfinance.org
California School Finance Authority: www.treasurer.ca.gov/schools.asp
California School Information Services (CSIS):
www.cde.ca.gov/demographics/csis
CDE School Facilities Planning Division:
www.cde.ca.gov/re/di/or/division.asp?id=sfpd
Council of Educational Facility Planners: www.cefpi.org/
DataQuest: <http://data1.cde.ca.gov>
Department of General Services: www.dgs.ca.gov/default.htm
Division of the State Architect: www.dsa.dgs.ca.gov/default.htm
EdSource Online: www.edsource.org

Education Data Partnership (Ed-Data): www.ed-data.k12.ca.us
Fiscal Crisis & Management Assistance Team: <http://www.fcmat.org/>
National Census Bureau: www.census.gov
National Center for Education Statistics (NCES): <http://nces.ed.gov>
National Education Association (NEA): www.nea.org
No Child Left Behind, U.S. Department of Education:
www.nochildleftbehind.gov
Office of Public School Construction: www.opsc.dgs.ca.gov/default.htm
OPSC Program Handbooks: www.opsc.dgs.ca.gov/Publications/default.htm
Overview of State School Facility Programs:
www.documents.dgs.ca.gov/OPSC/Publications/Other?SFP_Info.pdf
Policy and Evaluation Division (CDE): <http://api.cde.ca.gov/reports.html> or
<http://ayp.cde.ca.gov>
Public School Construction Process:
www.schoolconstruction.dgs.ca.gov/index.html
The Rand Corporation: www.rand.org
School Facility Programs:
www.opsc.dgs.ca.gov/Programs/SFPrograms/default.htm
School Fiscal Services (CDE): www.cde.ca.gov/fiscal
School Services of California: www.sscal.com
Standards and Assessment Division (CDE): www.cde.ca.gov/statetests/
State Allocation Board (SAB) – About:
[www.opsc.dgs.ca.gov/AboutUs/about SAB.htm](http://www.opsc.dgs.ca.gov/AboutUs/about_SAB.htm)
Total School Solutions: totalschoolsolutions@totalschoolsolutions.net
U. S. Department of Education: www.ed.gov

Course Evaluation Plan

All student work must demonstrate academic and research rigor of doctoral-level quality. Students are expected to:

1. Participate actively in all class activities. This implies attendance, completion of assigned readings, completion of assignments, and participation in discussions and other group activities. Complete online discussion assignments on Blackboard. Students are expected to utilize Blackboard for announcements, discussions, course documents, websites and grade center. Students are expected to be in attendance for each class meeting, on time for each class meeting, and remain in class for the entire class meeting. In the event of an emergency or obligation which cannot be rescheduled, please contact the instructors **before** class begins.
2. Take quizzes after major topics (school finance, budgeting, and school facilities). The quizzes are comprised of objective or short answer/short essay questions.
3. Complete two (2) individual projects. Select topics from two of the three areas of school finance, budgeting or facilities in which you have an interest. Obtain the instructors' approval of the topics. Schedule your presentations with the instructors.

- a. Individually prepare a 5-7 page written report (exclusive of title page, bibliography or reference page, and handouts) on each of your topics. Papers are due when the report is presented to class.
 - b. Individually submit power point presentation to instructors when report is made.
4. Complete two group projects.
 - a. Jointly interview a district school business official/director of fiscal services regarding the district's/college's budget development process. Make a group Power Point Presentation to the class. Give a copy of the Power Point to the instructors at the time of the presentation. This report will be scheduled during the budgeting portion of the course (Weeks 4–6). In the oral and Power Point Presentation, specifically answer the interview questions provided by the instructors at the first class meeting.
 - b. Jointly interview a director of facilities planning. Make a Power Point Presentation to the class. Give a copy of the Power Point to the instructors at the time of the presentation. This report will be scheduled during the facilities portion of the course (Weeks 7-9). In the oral and Power Point Presentation, specifically answer the interview questions provided by the instructors at the first class meeting.
 5. Take the final examination. The final examination will be administered on the last meeting date. The examination will cover the entire class, content of student reports presented in class, and materials provided in class.
 6. You are required to follow the APA writing guidelines for all papers. Attach a list of references/bibliography to all written assignments in APA format.

Course Grades

Weighting of course requirements will be as follows:

	<u>%</u>	<u>Points</u>
Attendance/Participation	10	50
Quizzes (3)	10	50
Individual Projects		
Project #1	10	50
Project #2	10	50
Group Projects		
Budgeting	20	100
Facilities	20	100
Final Examination	<u>20</u>	<u>100</u>
	100%	500 Points

Percentage Grade Values

A	93-100	465-500 Points
A-	90-92	450-464 Points
B+	87-89	435-449 Points
B	84-86	420-434 Points
B-	80-83	400-419 Points
C+	77-79	385-399 Points
C	74-76	370-384 Points
C-	70-73	350-369 Points

Portfolios

Students are reminded to select required and optional artifacts from this course for inclusion to their Portfolio. Each Portfolio will contain the following elements:

1. Statement of Purpose in the Ed.D. program.
2. Current (updated) resume.
3. Examples of coursework reflecting the Student Learning Outcomes and core concepts (e.g., papers submitted, tests completed, projects completed, etc.) with an indication of how each element submitted is relevant to their dissertation topic and research activities.
4. Summary of research and dissertation activities. Students should submit a summary (no longer than one page for each element submitted) as to work they have completed on their dissertation. Organization of this section of the Portfolio should align with the dissertation chapters: a) Research Question; b) Literature Review; c) Methodology; d) Results; and, e) Conclusions. The Portfolio, over its development, should provide longitudinal evidence of activities related to completion of the dissertation. Additionally, students may also submit a summary regarding any research activities that may be in addition to their dissertation.

Additionally, students may include optional elements, such as, but not limited to:

5. Conference participation and/or presentations
6. Manuscript/publication drafts
7. Noteworthy course work/projects
8. Professional work samples

Portfolios are to be submitted each summer quarter for evaluation. It is the student's responsibility to ensure they are creating and maintaining their Portfolio throughout the year.

Course Calendar

April 4 Introduction to the Course
Overview of School Finance (Terminology, History, New K-12 Funding)

Selected Readings

- *An Overview: Public Schools in California*
- *System of Allocations*
- *Keeping California School Districts Fiscally Healthy*
- *The Basics of California's School Finance System*
- *A Chronology of School Finance Legislation, Court Cases and Initiatives*
- *A Glossary of School Finance Terms*

April 11 Continue School Finance Overview
Proposition 98
Optional Extra Credit (Due April 20 electronically to the instructors)
Structure of State Finance – What are top three State revenues?
Encumbrance Accounting Exercise (Provided by instructor)
School Finance Definitions (Provided by instructor)
Individual Reports (School Finance)
Assign Jigsaw Reading of *Understanding School District Budgets*

Selected Readings

- *Proposition 98 Sets a Minimum Funding Guarantee for Education*
- *Rethinking How California Funds Its Schools*

April 18 No Class Meeting -- Read articles (See April 25 listing below)
-- Participate in online discussion TBA
-- Complete Optional Extra Credit Assignments

April 25 Guest Speaker – Community College Funding
Individual Reports (School Finance)

Quiz on School Finance

Selected Readings – Adequacy and Equity

- *How California Ranks*
- *How California Compares How Much Is Enough? Funding California Public Schools*
- *Weighted Student Formula*
- *Efficiency and Adequacy in California School Finance: A Professional Judgment Approach*
- *Aligning School Finance w/Academic Standards*

Jigsaw Reporting of *Understanding School District Budgets*
Overview of School Budgeting (Major Concepts, Terminology)

Individual Reports (Budgeting)
Group Reports – Budget Interviews

Selected Readings

- *Understanding School District Budgets*
- *The School District Budget Process*

May 2 Guest Speakers - Site Based Budgeting Under LCFF/LCAP
Budget Calendars – Local, State and Federal
Budget Advisory Committee
DeYoung’s Triangle – Budgeting by Program Needs/Priorities
Fiscal Policy Exercise
Individual Reports (Budgeting)
Group Reports – Budget Interviews

Selected Readings

- *Assessing the Costs of K-12 Education in California Public Schools*

May 9 Complete Overview of Budgeting
Finish Jigsaw Reporting of *Understanding School District Budgets*
Individual Reports (Budgeting)
Group Reports – Budget Interviews
Quiz on School Budgeting

May 16 Overview of School Facilities
Master Plan for School Facilities
Site Acquisition Planning
Individual Reports (Facilities)
Group Reports – Facilities Interviews

Selected Readings

- *Financing School Facilities in California*
- *Master Plan for School Facilities*
- *School Site Acquisition Criteria*

May 23 Holiday (Memorial Day Observance)

May 30 School Construction Components (By grade level span)
State Approval Process
Individual Reports (Facilities)
Group Report – Facilities Interviews

Selected Readings

- *School Construction Components*
- *State Approval Process*

June 6	School Facilities Funding Options Analysis of Funding Options Individual Reports (Facilities) Group Reports – Facilities Interviews Quiz on School Facilities Review for Final Examination <u>Selected Readings</u> <ul style="list-style-type: none"> • <i>Funding for Facilities</i> • <i>Financing School Facilities in California</i>
June 13	Individual Reports (Other Topics/Remaining Reports) Group Reports (Facilities) Final Examination

Course Policies

Attendance: Students are expected to arrive at each session on time and remain for the entire class. Students who must be absent or tardy must contact the instructor by telephone or e-mail as early as possible. If you have to miss one class **for an emergency or obligation which you cannot reschedule, you may complete a mutually acceptable alternate assignment for one absence without penalty.** Each subsequent absence after the emergency absence will result in a 10 point drop in the student's final grade. Students may not complete alternate assignments for subsequent absences.

Tardy: Students are expected to arrive at each session time and remain for the entire class. Each tardy (arriving late or leaving early) will result in pro rata point reduction of time missed to the total weekly class time for each class meeting held on campus.

Revisions: Assignments (except budget analysis) can be revised once for a higher grade. To be eligible for revisions, original assignments **must be turned in on time.** **Revisions must be stapled to the originally submitted paper to receive credit and must be turned in the following session.**

Academic Honesty: "Plagiarism and cheating are violations of the Student Discipline Code and may be dealt with by both the instructor and the Judicial Affairs Officer. Questions about academic dishonesty and the policy should be addressed to the Office of the Vice President, Student Services.

Plagiarism is the act of presenting the ideas and writings of another as one's own. Cheating is the act of obtaining or attempting to obtain credit for academic work through the use of any dishonest, deceptive, or fraudulent means.

Cheating includes but is not limited to:

Copying, in part or in whole, from a test, software, or other evaluation instrument;

- Submitting work previously graded in another course unless this has been approved by the course instructor or by departmental policy;
- Submitting work simultaneously presented in two courses, unless this has been approved by both course instructors or by the department policies of both departments;
- Using or consulting during an examination sources or materials not authorized by the instructor;
- Altering or interfering with grading or grading instructions;
- Sitting for an examination by a surrogate, or as a surrogate;
- Any other act committed by a student in the course of his or her academic work, which defrauds or misrepresents, including aiding or abetting in any of the actions defined above.

Plagiarism is academically dishonest and makes an offending student liable to penalties up to and including expulsion. Students must make appropriate acknowledgements of the original source when material written or compiled by another is used.” Source: California State University, San Bernardino. Academic Regulations, p. 60. *2003-2004 Bulletin of Courses*.

Commitment to Diversity:

In our commitment to the furthering of knowledge and fulfilling our educational mission, California State University, San Bernardino seeks a campus climate that welcomes, celebrates, and promotes respect for the entire variety of human experience. In our commitment to diversity, we welcome people from all backgrounds and we seek to include knowledge and values from many cultures in the curriculum and extra-curricular life of the campus community. Dimensions of diversity shall include, but are not limited to, the following: race, ethnicity, religious belief, sexual orientation, sex/gender, disability, socioeconomic status, cultural orientation, national origin, and age. (From the *CSU San Bernardino University Diversity Committee Statement of Commitment to Diversity, 1995*)

In keeping with the university’s Commitment to Diversity, the faculty of the College of Education fully support the Americans with Disabilities Act (ADA). Faculty will provide reasonable accommodation to any student with a disability who is registered with the Office of Services to Students with Disabilities and who needs and requests accommodation. If you are in need of an accommodation for a disability in order to participate in this class, please let the instructor know ASAP and also contact Services to Students with Disabilities at UH-183, (909) 537-5238, ssd@csusb.edu.

