

**OAKLAND UNIVERSITY
DEPARTMENT OF EDUCATIONAL LEADERSHIP
WINTER 2018**

COURSE: EL6320: School Finance and Business Administration

CREDITS: Four Semester Hours

INSTRUCTOR: Robert A. Martin, Ph.D.
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PREREQUISITES: Graduate standing; Pawley Hall, room 306, 5:30-8:50 pm

COURSE DESCRIPTION:

This course examines the major principles that govern the design and implementation of school funding formulas in relation to concepts of equity and adequacy for all students. Issues related to general business operations such as transportation, maintenance, operations and food service will also be explored, as well as business decisions relating to instructional issues within the school building and district.

REQUIRED TEXTS:

Roza, Marguerite (2010). *Educational Economics: Where Do School Funds Go?*
Washington: Urban Institute Press.

OTHER REQUIRED ARTICLES/TEXT:

Arsen, David and Plank, David (2003). *Michigan School Finance Under Proposal A: State Control, Local Consequences.*

<http://www.miparentsforschools.org/files/Arsen%20&%20Plank%202003.pdf>

Kearney, C. Phillip and Addonizio, Michael (2002). *A Primer on Michigan School Finance, Fourth Edition 2002.*

RESOURCES FOR PRESENTATIONS:

Harvard's Project Zero Thinking Routines:

http://www.visiblethinkingpz.org/VisibleThinking_html_files/VisibleThinking1.html

SRI Discussion Protocols: <http://www.schoolreforminitiative.org/protocols/>

COURSE TOPICS:

1. Historical and contemporary perspectives on systems for financing schools
2. Michigan's experience with Proposal A
3. Business services provided by local school districts and their relationship to teaching and learning
4. Business functions performed by principals (ISLLC Standard # 3)
5. Business and finance issues currently being faced by school districts
6. Relevant policy issues at the state and national levels

COURSE OBJECTIVES:

Students who successfully complete this course will be able to:

1. Understand the principles of equity, adequacy and feasibility in relation to the funding of K-12 education.
2. Demonstrate an understanding and develop informed opinions on Michigan's Proposal A
3. Describe operational services in a typical public school system
4. Understand issues and processes involved in developing annual school district budgets
5. Demonstrate the ability to access and share information regarding school finance, business operations and related current issues and trends at the local, state and national levels.
6. Analyze the financial operations of a school district including external and local funding sources and the various forms of taxation that impact school funding.
7. Understanding of the school budgeting process including revenue, expenditures and fund balance.
8. Examine auxiliary services related to school operations including facilities, transportation and food services.
9. Understanding of funding mechanisms for facility and capital needs.
10. Review cost containment strategies with respect to consolidation and outsourcing of school support services

This course will also enable students to understand and operationalize the following Standards for School Leaders adopted by the Interstate School Leaders Licensure Consortium:

- Standard 3: A school administrator is an educational leader who promotes the success of all students by ensuring management of the organization, operations and resources for a safe, efficient, and effective learning environment.
- Standard 5: A school administrator is an educational leader who promotes the success of all students by acting with integrity, fairness and in an ethical manner.
- Standard 6: A school administrator is an educational leader who promotes the success of all students by understanding, responding to, and influencing the larger political, social, economic, legal and cultural context.
- Two related State of Michigan standards dealing with field study and technology

METHODS OF INSTRUCTION:

1. Presentations by the instructor
2. Whole class and group discussions of readings and field investigations
3. Student presentations concerning field investigations
4. Debates and discussions on current topics relevant to the course objectives
5. Preparation of papers
6. Student led current issue discussions

COURSE REQUIREMENTS AND ASSIGNMENTS:

1. Summarize and present chapter/section information from Roza text or Arsen & Plank and lead class discussion(100 points)
2. Interviews with district business manager and building principal (50 points-Paper; 50 points-Presentation)
3. Proposal A Position Paper (100 points)
4. Moodle Assignments (50 points)
5. Attendance and Class Participation (100 points)

COURSE SCHEDULE AND ASSIGNMENTS:

January 8: ON CAMPUS

Introductions and Course Expectations
Graphic Organizers Activity
Introduction to Proposal A and its aftermath
Inquiry into school business and finance
Sign Up for Roza/Arsen & Plank Presentations

Assignment: Read Roza (pp. 1-14) and Kearney Part I

January 15: NO CLASS – MLK Day

January 22: ON CAMPUS

Presentations: AP-School Finance/R-Winds of Change
Kearney Activity

Assignment: Read Kearney Part II

January 29: ON CAMPUS

Presentations: AP-Impact of Proposal A/R-Agendas
Budget Review
Kearney Activity

February 5: ON CAMPUS

Presentations: AP-Current Issues/R-Driving Blind

Assignment: Read Kearney Part III

February 12: ON CAMPUS

Presentation: R-What Does it Mean?

Kearney Activity

Budget Review

February 19: NO CLASS_ OU Break

February 26: ONLINE

Conduct Interviews before Mar. 12

March 5: ON CAMPUS

Presentation: R-Problem

Review of preliminary info discovered in Interviews

Assignments:

Review Utica Community Schools 'Equity Excellence' Board Policy.

March 12: ONLINE

Due: Interview Write-Ups

March 19: ON CAMPUS

Presentation: R-Solution

Bring copy of building and/or district budget

March 26: ON CAMPUS

Interview Presentations (10)

Proposal A discussion

April 2: ONLINE – Work on Proposal A Position Paper

April 9: ON CAMPUS

Interview Presentations (10)

April 16: ONLINE

Due: Position Paper on Proposal A

Student Led Discussions Roza Chapters and Arsen/Plank (100 pts): Your job as an individual facilitator/presenter will be to help your classmates assimilate the information in the chapter or section. Your presentation will include 3 requirements:

1. An overview of information contained in the chapter or section
2. An activity to help the class assimilate the information
3. An artifact that represents the main idea(s)

Suggestions for **activities** to help the class assimilate the information are: discussion protocols, thinking routines, simulations, exercises or similar. Your **artifact** might be a document (primary source document, cartoon, news article, infographic, etc.) an object that represents the main idea, or something you create (pamphlet, bookmark, infographic, etc.)

Interviews (50 pts-Paper; 50 pts-Presentation):

Interview the person in charge (Director/Assistant Superintendent) of business and finance in a public school. This interview can be done in pairs if needed and we will discuss in class who to interview.

Interview a building Principal regarding how budget and other decisions are made at the school level, and will help determine the level of autonomy the Principal has in his/her respective district.

Interview questions will be determined by the class and the course instructor, and you may add your own questions as well. Write up the answers to the questions and bring to class on the due date.

Rubric for Presentations

An Exemplary Presentation

An exemplary presentation includes all required elements and each element is of a high quality, clearly presenting the content thoroughly and clearly, utilizing examples. The presentation actively involves the audience, provides thought-provoking “hooks” to engage the learner, and contains effective and interesting visual, auditory or other opportunities for assimilation of information by the audience. If done in pairs or a group, members/partners share equally in preparation and presentation responsibilities, giving consideration to strengths of each member/partner. The presenter(s) show(s) highly developed presentation skills. The presentation provokes interesting discussion or thought, and the audience is interested in the topic.

A Proficient Presentation

A proficient presentation includes all required elements and each element is of good quality, presents content clearly, utilizing some examples. Audience involvement is inconsistent or somewhat passive, learner engagement is evident. Presentation contains mostly effective visual, auditory or other opportunities for assimilation of information by the audience. If done in pairs or a group, members/partners share equally in preparation and presentation responsibilities, giving consideration to strengths of each member/partner. The presenter(s) show(s) well-developed presentation skills. The presentation provokes interesting discussion or thought, and the audience is interested in the topic.

A Basic Presentation

A basic presentation includes all required elements and each element is of adequate quality. Content is mostly clearly, utilization of examples is inconsistent. Audience involvement is mostly passive, learner engagement is inconsistent but evident. Presentation contains somewhat effective visual, auditory or other opportunities for assimilation of information by the audience. If done in pairs or a group, members/partners share equally in preparation and presentation responsibilities, giving consideration to strengths of each member/partner. The presenter(s) show(s) mostly well-developed presentation skills. The presentation provokes some interesting discussion or thought, and the audience interest in the topic is somewhat inconsistent.

Unsatisfactory Presentation

An unsatisfactory presentation includes some, but not all required elements, or elements are of poor quality. Clarity of content is inconsistent, examples are ineffective or under-utilized. Audience involvement is mostly passive, learner engagement is absent or inconsistent. Visual, auditory or other opportunities for audience assimilation of information are absent or ineffective. Presentation provokes little discussion or thought, and the audience is indifferent to the topic presented.

Rubric for Proposal A Paper: Should Proposal A Be Reformed?

Proposal A Critique: 100 points

As an effective teacher leader, you will be asked to articulate your vision and/or opinion on a number of topics. Hence it is important to develop an informed point of view that is logical, fair and responsive to the opposing viewpoint. This assignment is designed to develop those skills by having each **describe the impact of Proposal A on local school district funding using appropriate research and statistics. Take a stand on whether or not Proposal A should be reformed, and suggest how this might be accomplished.** As it is designed as a persuasive paper, it will **require analysis as well as synthesis of information** to be complete. Citations can be informally made by referring to authors read in class. If you use other sources, please cite in a bibliography at the end of the paper.

This paper is designed to be more of an Op-Ed piece than a scholarly analysis. Please write as much as you believe necessary to adequately express and support your opinion, approximately 3-5 pages.

An Exemplary Paper/Presentation

An exemplary paper is well written and well documented, following APA format for all citations, title page, abstract and body of the paper. This paper uses information gained from articles, papers, and information gained through class regarding the impact of Proposal A on local school district funding. This evidence includes appropriate research and statistics to present the advantages and disadvantages of Proposal A and whether it should remain as the method for funding school districts in our state. While the length of this paper does not allow for a complete or comprehensive analysis, it should explain and describe how this system of financial resource allocation has impacted local school districts throughout the state. The paper arrives at a conclusion about the impact of Proposal A and presents it effectively.

A Proficient Paper/Discussion

A proficient paper is well written and meets the requirements of the assignment, summarizing the main ideas regarding the advantages and disadvantages of Proposal A. Research may be presented but the analysis is not as robust. The depth of reflection and the conclusion are presented but are less detailed and less complete.

A Basic Paper/Discussion

A basic paper follows the requirements of the assignment without substantial depth or breadth. The paper provides only a superficial analysis and does not synthesize major concepts or research findings. The paper does not contain a clear conclusion regarding the impact of Proposal A or any recommendations for enhancement or alternatives.

An Unsatisfactory Paper/Discussion

The paper is not clear or well written and may have grammatical or typing errors. It does not present an analysis of Proposal A, instead describes unrelated points without tying the information together in a manner to inform the reader.

Rubric for Interview

Interview: 100 points

As an effective teacher leader, part of your expected knowledge base will be to have an understanding of the operations of the district as a whole. This assignment is designed to develop an understanding of financial operations within a school district. As it is designed as a learning experience, you are expected to gain a better understanding of how the departments in your district integrate into a connected system.

An Exemplary Interview

An exemplary interview demonstrates that careful thought and consideration were put into the development of the questions included in the interview. The depth of knowledge the department leader possesses was clearly demonstrated and all areas of responsibility are carefully taken into account. Responses to the questions posed were thorough and included information that was helpful to the casual reader to understand how the department operates within the district as a whole.

A Proficient Interview

A proficient interview is well developed and meets the requirements of the assignment, summarizing the main areas of responsibility within the chosen department. The interview met the requirements of the assignment. Responses to the questions posed answered the questions and provided adequate insight into the operations of the department. The depth of reflection and the conclusion are presented but are less detailed and less complete.

A Basic Interview

A basic interview follows the requirements of the assignment without substantial depth or breadth. The interview provides only a superficial analysis and does not adequately account for all facets of the department. The interview answers the questions but has not depth of reflection and includes minimal responses. The conclusion presented is a superficial analysis of the department.

An Unsatisfactory Interview

The interview did not stay within set parameters nor had a clear and understandable format. Important areas of the operation may be overlooked. It does not present a thoughtful interview but instead demonstrates minimal effort in complying with the interview requirements. Responses to the questions are short and leave the casual reader lacking knowledge of the particular department within the district.

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