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Schedule Information

Location: Science and Technology I Room 212

Meeting Times: Tuesdays, 4:30 – 7:10, August 31 – December 7 2010.

Course Description

Explores basic functions in financial and human resource management. Examines legalities, ethics, and politics of resource procurement and allocation. Provides experiences to help students better understand tasks typically performed by school leaders.

Additional Course Description

The course provides authentic experiences that help students to achieve a deeper understanding of the tasks typically performed by school leaders. Students are expected to participate actively in hands on, real world based activities, applying what they read and learn in class.

Course Delivery

Class sessions will consist of lectures, discussions, problem-based learning, role-playing, and student presentations. Students should see themselves as my partners in creating a valuable and memorable educational experience.

Student Outcomes

At the conclusion of this course, successful students should be able to:

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1. apply major concepts related to financial and human resource allocation and management;
2. use a site allocation to build a budget that supports school mission and goals (required performance);
3. develop a staffing plan that is consistent with site goals and district guidelines (required performance);
4. evaluate the effectiveness of simulated teacher interviews that are consistent with legal guidelines;
5. experience their efforts to mediate disputes;
6. construct a persuasive grant proposal to support school improvement;
7. use technology for learning and administrative purposes; and
8. participate in reflective practice.

National Standards and Virginia Competencies

ELCC Standard 1.0: An education leader promotes the success of every student by facilitating the development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by all stakeholders.
1.1 Collaboratively develop and implement a shared vision and mission
1.2Collect and use data to identify goals, assess organizational effectiveness, and promote organizational learning
1.3 Create and implement plans to achieve goals

ELCC Standard 2.0: An education leader promotes the success of every student by advocating, nurturing and sustaining a school culture and instructional program conducive to student learning and staff professional growth
2.1 Nurture and sustain a culture of collaboration, trust, learning, and high expectations
2.7 Maximize time spent on quality instruction

ELCC Standard 3.0: An education leader promotes the success of every student by ensuring management of the organization, operation, and resources for a safe, efficient, and effective learning environment.
3.1 Monitor and evaluate the management and operational systems
3.2 Obtain, allocate, align, and efficiently utilize human, fiscal, and technological resources
3.5 Ensure teacher and organizational time is focused to support quality instruction and student learning

ELCC Standard 5.0: An education leader promotes the success of every student by acting with integrity, fairness, and in an ethical manner.
5.4 Consider and evaluate the potential moral and legal consequences of decision-making
5.5 Promote social justice and ensure that individual student needs inform all aspects of schooling

This course addresses the following VDOE Competencies:
1.b. Knowledge, understanding and application of systems and organizations, including
(7) Effective communication skills including consensus building, negotiation, and mediation skills.

1.c. Knowledge understanding and application of management and leadership skills that achieve effective and efficient organizational operations, including
(3) Management decisions that ensure successful teaching and learning including, human resources management and development, theories of motivation, change in school culture, innovation and creativity, conflict resolution, adult learning and professional development models;
(4) Principles and issues related to fiscal operations of school management; and
(7) Technologies that support management functions.

Relationship of Course Goals to Program Goals

This course introduces students to major issues and practices in financial and human resource management as part of the Education Leadership endorsement sequence. A substantial emphasis on simulation and follow-up discussion gives students opportunities to learn and practice skills they will use in their internship experiences and administrative careers. All of the program goals are active, to a greater or lesser degree, in this course. Students will:

- engage in reflective practice with regard to financial and human resource management.
- strengthen and improve their communication skills through simulation, class discussion, and paper writing.
- understand how resource allocation supports or inhibits cultural, economic, and learning diversity.
- reflect on the ethical implications of resource allocation choices in schools and school districts.
- use computers for communication, data analysis, and data presentation.

Internship in Education Leadership—EDLE 791

All students should be making progress on their internship during the semester in which they are enrolled in EDLE 614. Consequently, we will bring up issues related to the internship. Students should be seeking internship opportunities that provide practice with budget allocation, staffing planning, and personnel management.

Course Materials

Readings
Articles will be made available.

Outside-of-Class Resources

All students are required to use http://www.taskstream.com as part of this course. This is an Internet site where information for the course will be posted. All students are expected to have access to a personal computer that is linked to the

Internet and the ability to use word processing, spreadsheet, and web-browsing software.

Grading

Students' grades are based on their proficiency with respect to the student outcomes stated above. Each outcome will have an oral (class participation) and/or a written component. The outcomes are weighted as described below:

OUTCOMES	ORAL PRODUCTS	WRITTEN PRODUCTS	PORTION OF FINAL GRADE
Students will apply major concepts related to financial and human resource allocation and management. Students will use a site allocation to build a budget that supports school mission and goals. Students will develop a staffing plan that is consistent with site goals and district guidelines.	Students will present, defend, and reflect upon resource allocation plans.	Students will display their own budgets and staffing plans in a spreadsheet format and include brief cover memos explaining their rationales for each document.	Each oral presentation, discussion, and reflection is worth 10 points. Each written report is worth 15 points.
Students will evaluate the effectiveness of simulated teacher interviews that are consistent with legal guidelines.	Students will participate in mock interviews and follow-up discussion.	Students will write a reflective essay about the interview experience.	Mock interview participation is worth 5 points. The reflective essay is worth 15 points
OUTCOMES	ORAL PRODUCTS	WRITTEN PRODUCTS	PORTION OF FINAL GRADE
Students will seek external financial resources for their schools or districts.		Students will prepare grant proposals for submission after the end of the course.	Grant proposals are worth 20 points.
Students will use technology for learning and		Students will use TaskStream, spreadsheet, and word	Active participation in each class and

administrative purposes		processing software as part of their participation in the course.	TaskStream online discussions is worth 10 points.
Students will participate in reflective practice.	The course will employ reflective practice techniques throughout		

Below are the basic percentages for the various kinds of work required for the class. Students should always bear in mind that grading is primarily my judgment about your performance. Grades are designed to indicate your success in completing the course, not the level of effort you put into it.

Class participation	10 percent
Oral communication	25 percent
Written communication	65 percent

Participation

A large proportion of the work in this class will be done in small groups. Each student is expected to be an active, contributing member of her/his small group in every class session and outside of class. Every student is also expected to contribute to TaskStream discussions as they become available. If you are absent or miss part of a class session, you may lose participation points. **<u>If you are absent for an oral activity listed above, there will be no alternative way to engage in the activity and you will not receive credit for it.</u>** Such an absence will cause you to lose participation points regardless of your overall attendance record**.**

Absence From Class

Students are expected to attend every class for its entirety. Emergencies sometimes arise, however. If you need to be absent from class, you are expected to notify me in advance by telephone or e-mail. If you miss more than one class, you will lose participation points. If you come to class more than 30 minutes late or leave more than 30 minutes early, you will lose participation points. Papers due on a day you are absent **must be submitted via TaskStream by the due date.**

Writing

There are four writing assignments for this course. The budget and staffing assignments are completed in groups and are more numerical than verbal, but the

verbal portion is important. It is critical that all group members contribute equally to a high quality final product. Your reflection on the interview process and your grant proposal will require substantially more writing. All written work should be **of the highest quality**. See detailed assignment sheets and assessment rubrics at the end of this syllabus.

Late Work

Students are expected to submit their work on time. If you have an emergency or a work log-jam, it is acceptable to turn in an individual assignment up to 48 hours late. **I will not accept any work later than 48 hours after it is due**. Any attempt to submit work past the 48-hour deadline will result in no credit for the assignment.

Students may revise and re-submit graded work to improve their performance. Such revisions are due **no later than one week after** receiving my feedback on the assignment. An assignment grade will be re-considered, but no grades will be negotiated.

Grading Scale

A+	=	100 percent
A	=	95 – 99 percent
A-	=	90 – 94 percent
B+	=	86 – 89 percent
B	=	83 – 85 percent
B-	=	80 – 82 percent
C	=	75 – 79 percent
F	=	74 percent or below

CEHD/GSE Expectations for All Students

The College of Education and Human Development (CEHD) and the Graduate School of Education (GSE) expect that all students abide by the following:

Students are expected to exhibit professional behavior and dispositions. See http://cehd.gmu.edu for a listing of these dispositions.

Students must follow the guidelines of the University Honor Code. See http://academicintegrity.gmu.edu/honorcode for the full honor code.

Students must agree to abide by the university policy for Responsible Use of Computing. See http://mail.gmu.edu and click on Responsible Use of Computing at the bottom of the screen.

EDLE 614 Proposed Course Schedule

DATE	TOPICS	ASSIGNMENT

Aug. 31	• Course Overview • Money Matters • Budget Workshop Overview	READ: Rebell & Wardenski: "Of Course Money Matters" at http://www.schoolfunding.info/
Sept. 7	• School Vision, Mission, and Goals and School Budget • Ethical/legal Issues and School Finance • Budget Workshop	
Sept. 14	Budget Workshop	
Sept. 21	• Staffing Schools • School Vision, Mission, and Goals • Ethical/legal Issues and School Staffing • Staffing Workshop Overview	*Budget Allocation Assignment due Read, take notes, reflect and apply: **Teacher Quality and Student Achievment: Making the Most of Recent** at: www.tqsource.org/publications/March2008Brief.pdf and **Teacher Quality and Student Achievement** at: *epaa.asu.edu/ojs/oldepaa/redirect/?v=8&n=1*
Sept. 28	• Staff Recruitment • Staffing Workshop	
Oct. 5	• Staff Interview and Selection • Staffing Workshop	
Oct.12	The Interview Process	*Staffing Allocation Assignment due
Oct. 19	Grant Writing (Guest speaker)	Read, take notes, reflect, & apply: TappingThePotential/TappingThePotential.pdf http://www.all4ed.org/files/archive/publications/
Oct.26	Staff Interviews	
Nov. 2	Staff Interview Debrief Retaining and Developing High Quality Teachers	Teacher Interview Responses due
Nov. 9	Grant Writing	
Nov. 16	Support Personnel (Guest	

	Speaker)	
Nov. 23	No Class (electronic session)	Grant Proposal Assignment due
Nov. 30	Resume Writing and Interviewing(Guest Speaker)	
Dec. 7	Wrap Up	

*These assignments must be completed as a group. One grade will be assigned to the final product. The same grade will be assigned to each group member. **Students will work in the same groups for the budget allocation, the staffing allocation, and the interview.**

WRITING ASSIGNMENT # 1—BUDGET ALLOCATION
15 Points

Rationale:

Budget allocations must be prepared in a fashion that is both comprehensive and clearly understood by school personnel, central office administrators, and parents. The primary goal of this assignment is to help students learn how to take a site budget dollar amount; allocate it among needs at the school site consistent with the school's vision, mission, and goals; and present the allocation in a brief verbal statement, in detail using numbers. (Note: The oral portion is not part of this assignment sheet, but will occur during class.)

Product:

Each group is required to submit four written pieces for this assignment (Note: Every student in the group must submit all four pieces so that all can be graded through TaskStream):
1. For each school, a brief, verbal overview of the budget that includes a clear rationale for the allocation of funds—this may not be longer than one single-spaced page and serves as a cover memo for #2 below
2. For each school, a spreadsheet that shows the dollar amount allocated to each relevant budget category and the fact that the budget balances

Suggestions:

1. Your cover memos should be as brief as possible, but they also need to be clear. They should be written with the person who misses your budget meeting in mind. In other words, you want to state all the important thinking that went into the budget to avoid future arguments as much as possible.
2. Be certain your cover memos have a clear thesis—"My rationale for this budget allocation is _____ because _____." Support your thesis with strong reasoning in the rest of the statement.
3. Your spreadsheets should be simple enough for anyone to be able to understand. Teachers are most concerned about who gets what relative to their own budgets, so you need to make certain that comparisons are easily made.
4. Remember, this is a group project. Before you begin, be certain to get clear agreements and understanding on the following:
   - How and when will you communicate and/or meet with one another while working on the project?
   - What work will be divided up and how?
   - What work requires approval from the whole group before going forward?
   - What deadlines will you need to meet along the way to insure that your assignment is ready on September 21?

BUDGET ALLOCATION
ASSESSMENT RUBRIC

	EXCEEDS EXPECTATIONS	MEETS EXPECTATIONS	APPROACHING EXPECTATIONS	FALLS BELOW EXPECTATIONS
Cover Memo—School Factors (20%) (ELCC 3.1) The cover memo communicates the rationale for and highlights of the budget. It communicates a connection to student achievement.	The cover memo conveys a clear, persuasive, and comprehensive plan of action for an efficient and effective allocation of resources. It persuades the reader that this particular allocation of resources has a high probability of improving student achievement.	The cover memo conveys a plan of action for efficient allocation of resources. Effectiveness may not be as compelling. The cover memo clearly communicates the rationale behind resource allocation to improve student achievement.	The cover memo leaves open questions of effectiveness and efficiency, but intent is communicated. The connection to student achievement is ambiguous.	The cover memo lacks a clear direction and the rationale for resource allocation is not clear. No connection between the budget and student achievement is evident.
Cover Memo—Context (5%) (ELCC 6.1) The cover memo communicates the larger context in which the budget was developed.	The cover memo provides clear and persuasive analysis about economic factors impacting the site budget.	The cover memo discusses important factors impacting the site budget.	The cover memo mentions one or two economic factors in the general school environment, but does not relate them directly to the site budget.	The cover memo fails to mention anything about economic factors impacting the site.

Spreadsheet (65%) (ELCC 3.1) The spreadsheet contains all pertinent budget information and demonstrates equity, effectiveness, and efficiency.	The spreadsheet persuasively supports the cover memo and demonstrates an equitable, effective, and efficient allocation of resources. It is clearly laid out in a way that allows the reader to understand it quickly. Formatting is used effectively to convey meaning.	The spreadsheet is consistent with the cover memo and all required data can be easily understood. The deficit or surplus is clearly indicated. Equity, effectiveness, and efficiency may not all be readily apparent.	The spreadsheet has some positive features, but it does not indicate an equitable, effective, and/or efficient allocation of resources. Inconsistencies are apparent and formatting may impede understanding.	The spreadsheet is confusing and/or is not consistent with the cover sheet.
Mechanics and accuracy (10%) Students use standard English and avoid grammar and punctuation errors. All data is accurately and consistently presented.	The assignment is **free** of errors—both verbal and numerical.	The assignment has a few errors.	The assignment has some errors.	The assignment has numerous errors.

WRITING ASSIGNMENT # 2—STAFFING ALLOCATION
15 Points

Rationale:

This assignment is very similar in format and requirements to the budget allocation assignment. The reason for this is that the needs are essentially the same—to present somewhat complicated data in a fashion that others can easily grasp.

Product:

Groups are required to submit four written pieces for this assignment:
1. A brief, verbal overview of the staffing allocation for each school that includes a clear rationale explaining how each one serves the vision, mission, and goals of the school
2. For each school, a spreadsheet that shows staff FTE allocated to each course or grade level and the fact that the school has not exceeded its staffing allotment (any "understaffing" must be indicated). This assignment is due October 12.

Suggestions:

1. See the budget allocation assignment

STAFFING ALLOCATION
ASSESSMENT RUBRIC

	EXCEEDS EXPECTATIONS	MEETS EXPECTATIONS	APPROACHING EXPECTATIONS	FALLS BELOW EXPECTATIONS
Cover Memo— School Factors (20%) (ELCC 3.1)The cover memo communicates the rationale for and highlights of the staffing allocation. It communicates a clear connection between the staffing allocation and student achievement.	The cover memo conveys a clear, persuasive, and comprehensive plan of action for an efficient and effective allocation of school staff. It is persuasive that this particular allocation of school staff has a high probability of improving student achievement.	The cover memo conveys a plan of action for efficient allocation of school staff. Effectiveness may not be as compelling. It communicates the rationale behind staffing allocation to improve student achievement.	The cover memo leaves open questions of effectiveness and efficiency, but intent is communicated. A rationale is present, but the connection to student achievement is ambiguous.	The cover memo lacks a clear direction and the rationale for the staffing allocation is not clear. No connection between the staffing allocation and student achievement is evident.
Cover Memo-- Context (5%) (ELCC 6.1) The cover memo communicates the larger context in which the budget was developed.	The cover memo provides clear and persuasive analysis about economic factors impacting the staffing allocation.	The cover memo discusses important factors impacting the staffing allocation.	The cover memo mentions one or two economic factors in the general school environment, but does not relate them directly to the staffing plan.	The cover memo fails to mention anything about economic factors impacting the staffing plan.

Spreadsheet (65%) (ELCC 3.1) The spreadsheet contains all pertinent budget information and demonstrates equity, effectiveness, and efficiency.	The spreadsheet persuasively supports the cover memo and demonstrates an equitable, effective, and efficient allocation of resources. It is clearly laid out in a way that allows the reader to understand it quickly. Formatting is used effectively to convey meaning.	The spreadsheet is consistent with the cover memo and all required data can be easily understood. The deficit or surplus is clearly indicated. Equity, effectiveness, and efficiency may not all be readily apparent.	The spreadsheet has some positive features, but it does not indicate an equitable, effective, and/or efficient allocation of resources. Inconsistencies are apparent and formatting may impede understanding.	The spreadsheet does not appear to relate to the cover memo. It is difficult to follow and does not make proper use of the software.
Mechanics and accuracy (10%) Students use standard English and avoid grammar and punctuation errors. All data is accurately and consistently presented.	The assignment is **free** of errors—both verbal and numerical.	The assignment has a few errors.	The assignment has some errors.	The assignment has numerous errors.

ASSIGNMENT #3—REFLECTIVE ESSAY ON INTERVIEW PROCESS
15 points

Rationale

Perhaps the most important activity for a school site administrator is the selection of staff—both certified and classified. Going through a mock process of teacher selection is helpful for thinking about important characteristics of prospective teachers and school needs. But, the experience is made richer by reflection so that the student can become much clearer in her or his own mind about how to make teacher selections count toward school improvement. This reflection paper will help you to discover what worked well during the interview(s), what could be improved, and what you would do differently next time.

Product

You will write a coherent reflective essay that explains your reaction to the total interview experience you had in connection with this class. Your paper must contain the following:
1. A thesis that clearly describes the major insights you gained as a result of participating in preparing an interview and the actual interviews that you witnessed
2. A brief description of what happened during preparation and the interviews
3. A thorough reflection of the entire process from start to finish that demonstrates the validity of your thesis
4. A conclusion that includes what you learned from the process and how you might engage in it differently when you are working as an administrator.

Interviews are scheduled for October 26 and the essay is due November 2

REFLECTIVE ESSAY ON INTERVIEW PROCESS
ASSESSMENT RUBRIC

	EXCEEDS EXPECTATIONS	**MEETS EXPECTATIONS**	**APPROACHING EXPECTATIONS**	**FALLS BELOW EXPECTATIONS**
Supporting Arguments (45%) The author must articulate arguments in support of the thesis. These should be logical and made compelling by clear examples.	Each paragraph of the body of the paper has a direct relationship to the thesis and helps to demonstrate the validity of the thesis. The author uses persuasive arguments relevant to the thesis.	The body of the paper provides some support for the thesis, but it also contains paragraphs that are not entirely persuasive.	Analysis is weak or difficult to follow. Some paragraphs are irrelevant to the thesis, not logical, or not persuasive	Analysis is largely absent from the paper. The paper may be expository rather than analytical.
Concluding Paragraph (25%) It is important to conclude your paper in a manner that is persuasive to the reader and that leads to broader thinking on the topic.	The conclusions the author draws are clearly stated in the final paragraph, beginning with a restatement of the thesis in new language. The concluding paragraph follows in a compelling manner from the body of the paper and explains what the author would do differently for the next interview opportunity	The conclusions the author draws are clearly stated in the final paragraph, but they may not be entirely persuasive.	Conclusions can be inferred from the body, but the thesis is not re-stated and the conclusions are not persuasive.	Conclusions are unclear or irrelevant to the thesis.
Grammar & Mechanics (10%) Any writing submitted for public review should be free of errors.	The paper is **free** of errors.	The paper contains few errors.	The paper contains some errors.	The paper contains numerous errors.

ASSIGNMENT #4—GRANT PROPOSAL
20 points

Rationale

Funds are usually tight in schools and districts, making it very difficult to initiate new and innovative programs. Consequently, grant money is often the only way to reach a particular population of students in a new way. Learning how to write a grant is a vital skill for a future education leader. The ideal way to approach this assignment is to pursue a grant that will support the School Improvement Project proposal you created in EDLE 690.

Product

1. Identify the financial needs of your SIP that cannot or will not be met through your school or district and target your grant toward meeting these needs. Alternatively, work with your principal or supervisor to identify an area of need that could be addressed through the procurement of additional funds.
2. Once you have identified a need at your site, you will explore several different sources of grant money to find one that is most appropriate to the need you have identified.
3. Following the guidelines of the grant you wish to receive, you will write a proposal that presents the need, your plan for how to meet the need, expected outcomes, how you will evaluate the success of your project, and a budget for the grant.
4. Grant proposals must be for not less than $1,000 and should probably not exceed $20,000.

The grant proposal is due November 23.

GRANT PROPOSAL
ASSESSMENT RUBRIC

	EXCEEDS EXPECTATIONS	**MEETS EXPECTATIONS**	**APPROACHING EXPECTATIONS**	**FALLS BELOW EXPECTATIONS**
Plan to Meet the Need (20%) For a plan to gain the confidence of a funding agency, it must be clearly and directly tied to the specific need you have identified.	The plan addresses the need in detail, demonstrating numerous links that show each aspect of the need will be met through the plan.	The plan is logically and tightly linked to the identified need.	The plan seems attractive but may have some areas that do not seem to be tied to need as you have identified it.	The plan is unclear and/or not directly linked to the need as you have articulated it.
Expected Outcomes (20%) The funding agency wants a clear picture of how the grant will help your site.	The expected outcomes are persuasively stated so that any person observing the grant in action would recognize them. Expected teaching and learning results are clear.	The expected outcomes are clearly presented and logically linked to the plan.	Expected outcomes are stated, but they are not as clear as they could be, or they seem unrelated to the plan and/or the need.	Expected outcomes are unclear or missing.
Evaluation of the Project (15%) The funding agency usually wants to know how you will know if the money was well spent.	The evaluation plan persuasively addresses all components of the plan to meet the need. Clear criteria and standards are established.	The evaluation plan addresses the plan to meet the need. Criteria and standards may not be entirely clear and/or logical.	The evaluation plan is not clearly connected to other aspects of the grant and/or lacks clear criteria and standards.	The evaluation plan is missing or difficult to understand. Criteria and/or standards may be missing.
Budget (15%) All grants require a budget so that the funding agency has a clear picture of how granted money will be spent.	The budget meets the criteria contained in the budget allocation assessment rubric. It supports all aspects of the plan to meet the need.	The budget is clear and well presented.	The budget is somewhat confusing.	The budget is missing or incomplete.

Grammar & Mechanics (10%) Any writing submitted for public review should be free of errors.	The grant proposal is **free** of errors.	The grant proposal contains a few errors.	The grant proposal contains some errors.	The grant proposal contains numerous errors.

CLASS PARTICIPATION ASSESSMENT RUBRIC

Levels: Criteria:	exceeds expectations	meets expectations	approaching expectations	falls below expectations
Attendance	Exemplary attendance, no tardies	Near perfect attendance, few tardies	Occasional (1-3) absences or tardies	Frequent (>3) absences or tardies
Quality of Questions, Interaction	Most queries are specific and on point. Deeply involved in class dialogue. Challenges ideas, seeks meaning.	Often has specific queries, stays involved in class dialogue, though sometimes tentative or off-base.	Asks questions about deadlines, procedures, directions or for help with little specificity. Little discussion of ideas.	Rarely asks questions of any quality.
Effort	Willingly participates when asked. Plays a leadership role in groups. Engages and brings out the best in others.	Willingly participates when asked. Takes on group tasks. Engages others.	Reluctantly participates when asked. Seeks easiest duties in groups. Tolerates others.	Actively avoids involvement when possible. Complains about others. Has large set of excuses.
Engagement	Enthusiastically initiates discussion. Personalizes and takes ownership of activities. Always knows where class or group is.	Sometimes initiates discussion and always works well with direction. Generally knows what's going on.	Seeks direction, but does not initiate discussion. May know where class or group is.	Waits for direction. Knows little of what is going on. Cannot describe where class or group is.