

**George Mason University  
College of Education and Human Development  
Education Leadership Program**

**EDLE 814.001 – Education Finance and Human Resources  
3 Credits, spring 2020**

**Thursday, 4:30 – 7:10 pm, 01/23/2020 –05/07/2020 (Thompson, Room 1010)**

**Faculty**

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**Office hours:** By Appointment

**Prerequisites/Corequisites:** None

**University Catalog Course Description**

EDLE 814 Education Finance and Human Resources (3:3:0)

Investigates and evaluates principles of human resource management and economic, legal and technical dimensions of school finance at the federal, state, and local levels of government. Reviews concepts and develops approaches for planning and implementing activities for effective human resource management, including current theories and practices related to recruitment, development, and appraisal of personnel. Applies concepts and procedures of conflict resolution, effective communication skills, managing change processes, and creating and maintaining a positive school system organization climate.

**Course Overview**

All public-school administrators need an understanding of how public schools are managed and financed, and what public policy options exist for improving funding. An important element of this course is the integration of school finance with the theory and practice of human capital investment, economic growth, taxation, state equity litigation, and state and federal school funding formulas.

*Program vision: The Education Leadership Program is dedicated to improving the quality of pre-K – 12 education through teaching, research, and service. Candidates and practicing administrators engage in course work devoted to experiential learning, professional growth opportunities, and doctoral research that informs practice. We educate exceptional leaders who act with integrity as they work to improve schools.*

## **Course Delivery Method**

Each session will consist of some combination of large and small group work and discussion. Students will work with a variety of primary sources and original research in class, both individually and in small groups. Knowledge is constructed collaboratively. For this reason, it is essential that students read the assigned materials carefully and come prepared to participate in discussion.

## **Learner Outcomes**

Students who successfully complete this course will:

1. Understand the basic concepts in the field and be prepared to apply them to practical problems.
2. Grasp the central issues in public school financial policy, evaluate public policy alternatives, and be able to recommend appropriate policy options.
3. Explain why universal education and its public financing is fundamental to the democratic form of government.
4. Discern the public policy implications for provision of equality of educational opportunity.
5. Explain to laymen the economic value of investment in education for the state and the individual.
6. Quantify the principal measures of education funding such as fiscal capacity, fiscal effort, income elasticity, etc.
7. Recognize the validity of political discourse concerning investment in public education.
8. Utilize the various statistical measures of resource distribution among states and local school districts.
9. Understand the effects of different types of taxation on public schools and the taxpayer.
10. Explain the various methods and structures of state funding mechanisms for public schools.
11. Discuss the various consequences of public funding of ecclesiastical private schools, and charter schools.
12. Explain the basic aspects of the American federal system and the principal laws by which the central government assists in the financing of public schools.
13. Explain how public-school infrastructure (capital outlay) is financed.
14. Demonstrate knowledge of the human resource function in schools and school districts.
15. Apply knowledge of school leadership domains and standards to human resources planning, hiring and retention of personnel, professional development, and personnel policies and issues.
16. Evaluate school human resource planning for consistency with district goals and plans, school mission, and student academic and social outcomes and make recommendations for improvement.

## Professional Standards

Upon completion of this course, students will have met the following Education Leadership Constituent Council (ELCC) standards:

- 2.1 Candidates understand and can sustain a school culture and instructional program conducive to student learning through collaboration, trust, and a personalized learning environment with high expectations for students.
- 2.3 Candidates understand and can develop and supervise the instructional and leadership capacity of school staff.
- 3.1 Candidates understand and can monitor and evaluate school management and operational systems.
- 3.2 Candidates understand and can efficiently use human, fiscal, and technological resources to manage school operations.
- 4.1: Candidates understand and can collaborate with faculty and community members by collecting and analyzing information pertinent to the improvement of the school's educational environment.
- 4.3 Candidates understand and can respond to community interests and needs by building and sustaining positive school relationships with families and caregivers.
- 4.4: Candidates understand and can respond to community interests and needs by building and sustaining productive school relationships with community partners
- 5.3: Candidates understand and can safeguard the values of democracy, equity, and diversity.
- 5.5: Candidates understand and can promote social justice within a school to ensure that individual student needs inform all aspects of schooling.
- 6.1 Candidates understand and can advocate for school students, families, and caregivers.
- 6.2 Candidates understand and can act to influence local, district, state, and national decisions affecting student learning in a school environment
- 6.3 Candidates understand and can anticipate and assess emerging trends and initiatives in order to adapt school-based leadership strategies.

## Required Texts

Alexander, K. & Salmon, R.G. & Alexander, F.K. (2015). *Financing Public Schools: Theory, Policy and Practice*. New York: Taylor and Francis.

Ziskin, I. (2015). *Three: The Human Resources Emerging Executive*. New Jersey: Wiley.

## Recommended Texts

*Publication Manual of the American Psychological Association* (7<sup>th</sup> Edition).

**Readings.** All additional required readings are available in Blackboard. See the Tentative Weekly Schedule below for specific titles. Selected optional articles and documents may also be found on Blackboard.

**Outside-of-class resources.** Online access is vital for the distance learning aspects of the course and is important if we experience school shutdowns because of the weather or other problems.

**E-mail.** All students are required to activate and monitor their GMU e-mail accounts. I recommend that you do not forward your Mason e-mail to a different account because attachments are often lost that way. It is best to check e-mail directly from your Mason account daily.

**Blackboard.** All students are required to use Blackboard as part of this course. This is an Internet site at which I will post vital information for the course and through which we will communicate from time to time.

**Microsoft Office.** It is my expectation that all students have access to Microsoft Office. We will be using Word for this course. If you do not have access to this software, you are required to obtain it within the first two weeks of the course. It is best to have the most recent (2010) version of the software.

## **Course Performance Evaluation**

**Submission of assignments.** All papers must be submitted *on time, electronically via Blackboard and/or hard-copy.*

**Written assignments.** Consistent with expectations of doctoral courses in the Education Leadership program, grading is based heavily on student performance on written assignments. The assignments constructed for this course reflect a mix of skills associated with the application of research to education leadership contexts. Overall, written work will be assessed using the following broad criteria:

1. Application of concepts embedded in assigned readings and other materials and reinforced in classroom activities
2. The quality of analysis, synthesis, and application
3. The degree to which writing is clear, concise, and organized

### **Other requirements.**

**Attendance.** Students are expected to attend every class on time and to remain in class until it ends. If you are ill or have an emergency that prevents you from attending class, please call or e-mail me in advance. If you miss more than one class, you arrive late to multiple classes, and/or you leave class early multiple times, you will be subject to loss of participation points (see below).

**Class participation.** Students are expected to participate actively in class discussions, in group activities, and in serving as critical friends to other students

**Weights of performances.** The overall weights of the various performances are:

***Class participation, 25 points.*** Students are expected to participate actively in class discussions, in group activities, and in serving as critical friends to other students. Attendance is expected for all classes and is considered an element of participation. **If you must be absent, please notify me by e-mail or phone.** More than one absence may result in a reduction in participation points. Arriving at class more than 30 minutes late or leaving more than 30 minutes before the end of class may result in loss of points.

***Written assignments 75 points.*** Four types of performance-based assignments will be completed during the semester. Each of the first two assignments builds toward the final Research Essay, while the application assignment focuses on applying theories to practice. The directions for each assignment and a rubric for grading each assignment are described at the end of this syllabus. The assignments and the points assigned are:

1. Topic Proposal (15 points)
2. Literature Review (20 points)
3. Research Essay (Required performance for course) (25 points)
4. Application assignment: Budget and Staffing Allocation (15 points)

## **Grading Policies**

### ***Grading scale.***

A+	100
A	95-99
A-	90-94
B+	87-89
B	83-86
B-	80-82
C	75-79
F	0-74

***Late work.*** Assignments submitted after 11:59 p.m. on the due date will be considered late.

## **Professional Dispositions**

See <https://cehd.gmu.edu/students/policies-procedures/>

## **Class Schedule**

**Tentative Weekly Schedule (subject to change) EDLE 814**

To accommodate the learning needs of class members, the topic, reading and assignment schedule may be amended during the semester. When the tentative weekly schedule is revised, revisions will be posted on our Blackboard course site.

<b>Class#</b>	<b>Date</b>	<b>Topic(s)</b>	<b>Reading/Writing Assignment</b>
1	01/23/2020	The Nature and Theory of the Public School	
2	01/30/2020	Fundamental Rights and State School Finance Litigation	Chapters 2 and 17 (Alexander) Chapter 2 (Ziskin)
3	02/06/2020	Nature of Human Resource Management in a Changing Environment  The System and Public Schools	Chapters 1 & 3 (A + Z)
4	02/13/2020	Equality of Opportunity: The Rationale	Chapter 4 (A + Z)
5	02/20/2020	Education as an Investment in Human Capital  Staffing the Organization	Chapter 5 (A + Z)  <b>Topic Proposal</b> (15 points)
6	02/27/2020 (online)	The politics of School Finance	Chapter 6 (A + Z) and <b>Reflection</b>
7	03/05/2020 (online)	Fiscal Capacity and Tax Effort in the Funding of Public Schools	Chapter 7 (A + Z) and <b>Reflection</b>
8	03/12/2020 (online)	GMU observed Spring Break Taxation for Public Schools	Chapter 8 (A)
9	03/19/2020	The Federal Role in Financing Education  Training and Developing Human Resources	Chapter 9 (A + Z)  <b>Application assignment #1</b>
10	03/26/2020	Compensating Human Resources  Teacher Compensation	Chapter 10 (A + Z)  <b>Literature Review</b> (20 points)

11	04/02/2020	Education Production Functions: Whether Money Matters	Chapter 12 (A) and Chapter 11 (Z)  <b>Application assignment #2</b> (total 15 points)
12	04/09/2020	Observed Spring Break (No Class)	
13	04/16/2020 (online)	Analyzing Equity and Adequacy of State School Finance	Chapter 13 (A) and <b>Reflection</b>
14	04/23/2020	State School Funding Methods	Chapter 14 (A)
15	04/30/2020	Financial Accounting Financing School Facilities	Chapters 15 & 16 (A)
16	05/07/2020	Employee Relations and Legal Matters	Chapter 12 (Z)  <b>Research Essay</b> (25 points)

## Core Values Commitment

The College of Education and Human Development is committed to collaboration, ethical leadership, innovation, research-based practice, and social justice. Students are expected to adhere to these principles: <http://cehd.gmu.edu/values/>.

## GMU Policies and Resources for Students

### *Policies*

- Students must adhere to the guidelines of the Mason Honor Code (see <https://catalog.gmu.edu/policies/honor-code-system/> ).
- Students must follow the university policy for Responsible Use of Computing (see <https://universitypolicy.gmu.edu/policies/responsible-use-of-computing/>).
- Students are responsible for the content of university communications sent to their Mason email account and are required to activate their account and check it regularly. All communication from the university, college, school, and program will be sent to students **solely** through their Mason email account.
- Students with disabilities who seek accommodations in a course must be registered with George Mason University Disability Services. Approved accommodations will begin at the time the written letter from Disability Services is received by the instructor (see <https://ds.gmu.edu/>).
- Students must silence all sound emitting devices during class unless otherwise authorized by the instructor.

### *Campus Resources*

- Support for submission of assignments to Tk20 should be directed to [tk20help@gmu.edu](mailto:tk20help@gmu.edu) or <https://cehd.gmu.edu/aero/tk20>. Questions or concerns regarding use of Blackboard should be directed to <https://its.gmu.edu/knowledge-base/blackboard-instructional-technology-support-for-students/>.
- For information on student support resources on campus, see <https://ctfe.gmu.edu/teaching/student-support-resources-on-campus>



**Notice of mandatory reporting of sexual assault, interpersonal violence, and stalking:**

As a faculty member, I am designated as a “Responsible Employee,” and must report all disclosures of sexual assault, interpersonal violence, and stalking to Mason’s Title IX Coordinator per University Policy 1202. If you wish to speak with someone confidentially, please contact one of Mason’s confidential resources, such as Student Support and Advocacy Center (SSAC) at 703-380-1434 or Counseling and Psychological Services (CAPS) at 703-993-2380. You may also seek assistance from Mason’s Title IX Coordinator by calling 703-993-8730, or emailing [titleix@gmu.edu](mailto:titleix@gmu.edu).

**For additional information on the College of Education and Human Development, please visit our website <https://cehd.gmu.edu/students/> .**

**Assignment #1: Topic Proposal**  
**15 points**

**Rationale**

The goal of this assignment is to identify an important issue related to funding equity that affects a program, school, or school level in which you have an interest and/or experience. After the issue has been identified, your next task is to support your choice of problem by describing why it is a problem and why it should be addressed (i.e., what negative consequences ensue from its presence). This will form the foundation for your individualized scholarly inquiry. Before you can generate your own research questions, you need to demonstrate an understanding of the key issues.

**Tasks**

1. Submit a 3-4-page essay that offers an overview of your selected issue.
2. Begin by addressing the following questions:
  - a. Where is this issue visible?
  - b. Who is involved?
  - c. What are the competing perspectives surrounding this issue?
  - d. What is at stake?
3. Once you have addressed the above questions, begin to move beyond the details of the current issue and raise your own research questions.
  - a. What do you want to learn more about?
  - b. What do you want to figure out?
  - c. Develop a set of at least three questions that will drive your research over the course of this semester.
4. Using at least 4 sources, this essay will focus *only* on the current incarnation of this debate.
5. In addition, submit a proposed bibliography of at least 10 sources, including at least two sources that provide a historical treatment of the issue.

## Assessment Rubric for Assignment #1: Topic Paper

**15 Points**

<b>Dimensions</b>	<b>Exceeds expectations (4)</b>	<b>Meets expectations (3)</b>	<b>Approaches expectations (2)</b>	<b>Falls below expectations (1)</b>
<b>Statement of Topic (20%)</b>	Offers a clear statement of issue of interest. Focuses on a specific component of a larger debate. Describes topic in clear and accurate terms.	Offers a clear statement of topic, but lacks focus and/or attempts to cover too much ground.	Offers neither a clear nor focused statement of interest.	Offers neither a clear nor focused statement of interest and makes inaccurate claims.
<b>Exploration of Debate (30%)</b>	Addresses succinctly the questions of where the issue is visible, who is involved, what are the competing perspectives, and what is at stake. Refers to relevant texts to ground characterizations. Presents topic overview in a clear, accurate, and bias-free manner.	Offers a clear exploration of a specific issue of debate of interest. Refers to relevant texts to ground overview. Author reveals clear bias, choosing sides or offering policy prescriptions. Cites and makes use of 4 sources.	Exploration of issue is vague or too broad. Author takes sides. Uses fewer than 4 sources, or cites 4 sources but does not make significant use of them.	Exploration of issue is unclear or inaccurate. Author does not refer to specific texts to ground overview and writes with clear bias. Does not cite or make use of appropriate sources.
<b>Use of Sources (10%)</b>	Cites and makes use of at least 4 high quality sources.	Cites and makes use of at least 4 sources, one or more of which may be of dubious quality.	Cites and makes use of 3 sources.	Cites and makes use of fewer than 3 sources.
<b>Statement of Research Questions (20%)</b>	Moves beyond the issue at hand and raises at least 3 meaningful questions that stem from the texts.	Raises two meaningful questions to guide future inquiry.	Raises only one meaningful question.	Raises questions that do not stem from the readings or hold potential of generating future research, or poses no questions.
<b>Proposed bibliography (10%)</b>	Provides a proposed bibliography of at least 10 high quality sources, including at least two sources that provide a historical treatment of the issue.	Provides a proposed bibliography of at least 10 sources, one or more of which may be of poor quality, or provides fewer than two sources that provide a historical treatment of the issue.	Provides a proposed bibliography of fewer than 10 sources.	Fails to include a proposed bibliography.
<b>Mechanics (10%)</b>	The essay is nearly error free and comports with APA guidelines.	The paper has some errors.	The paper has numerous errors.	The paper is sloppy and and/or makes no sense.

## **Assignment #2: Literature Review**

**20 Points**

### **Rationale**

Much of successful academic writing is based, in part, on the careful reading of secondary and primary source literature. Rather than summarizing the key points and arguments of a variety of authors, the goal of this exercise is to synthesize, including arguments pro and con, a body of scholarship.

### **Tasks**

1. In 6-7 pages, address the following questions in a well-crafted, compelling essay.
  - a. How has thinking on your chosen topic developed over time?
  - b. How do you account for these shifts?
  - c. In what ways do disciplinary conventions shape authors' analyses?
  - d. What are the main points of agreement and disagreement?
  - e. Where do you see authors engaging one another in scholarly discourse?
2. Drawing upon this body of literature, pose at least three questions that will motivate your future inquiry. Examine these questions, explicating how they grow out of the examined literature and exploring their larger significance. What will these questions help you figure out that we do not already know?
3. You must discuss and cite at least 10 approved sources, at least two of which are historical.

## Assessment Rubric for Assignment #2: Literature Review

**20 Points**

	<b>Exceeds expectations (4)</b>	<b>Meets expectations (3)</b>	<b>Approaches expectations (2)</b>	<b>Falls below expectations (1)</b>
<b>Presentation of Literature and Idea Development (60%)</b>	Examines and properly cites 10 sources, at least 2 of which are historical. Creates conversations across texts, thinking about the works as a cohesive body of literature. Rather than summarizing each work one by one, the author finds meaningful ways to synthesize the readings. Incorporates specific evidence from texts and offers an analysis. Considers the role of disciplinary conventions and links these observations to the essay's larger idea. Through an exploration of this body of literature, the author generates a cohesive, logical, and compelling idea that is woven throughout the review.	Examines and properly cites 10 sources, at least 2 of which are historical. The author attempts to generate a larger, original idea but this idea is not substantiated all the way throughout the essay or is separate from a discussion of the texts. Considers disciplinary conventions, but does not link these observations to a larger idea.	Examines 10 sources, at least 4 of which are historical. Rather than generating a larger idea and moving beyond the texts, the author summarizes each work. Does not consider the role of disciplinary conventions. Provides some evidence, but offers little analysis.	Examines fewer than 10 sources. Citations may be incorrect. Author offers only summaries. Presentation of authors' views may be inaccurate or incorrect. Does not consider the role of disciplinary conventions. Does not provide significant evidence to support claims. Does not provide analysis.
<b>Future Research Questions (30%)</b>	Clearly states and explicates three specific questions to motivate further research. The questions are a clear outgrowth of the literature discussed.	States three questions. Questions are too broad and/or are not fully explicated. Questions flow from previous discussion of literature.	Offers three vague questions. Neither clearly nor fully explicates significance or implications of questions. Questions only partially flow from discussion of scholarship.	Offers fewer than three questions. Questions are vague and may not be explicated. Questions do not flow from discussion of scholarship.
<b>Mechanics (10%)</b>	The essay is nearly error free.	The paper has some errors.	The paper has numerous errors.	The paper is sloppy and appears not to have been proofread.

## **Assignment#3: Research Essay**

### **Required Performance**

**25 Points**

#### **Rationale and Tasks**

As a continuation and culmination activity of the problem identified, the goal of this essay is to research how and when the problem occurred and what values, laws and/or regulations supported the problem. You will then need to identify an array of solutions to the problem; after possible solutions have been identified, you will select a solution and support that selection by demonstrating how it solves the problem, in comparison to other possible solutions to include ignoring the problem, and what unintended consequences might arise as a result of the solution and what you might do to prevent such consequences.

Your 12-15-page essay should use scholarly evidence in the form of quotations to support your points and address the following:

1. The steps outlined above.
2. Demonstrations of impacts from historical, economic, and/or political studies of the problem.
3. Demonstrations of impacts related to your own school systems or schools.

## Assessment Rubric for Assignment #3: Research Essay

**25 Points**

	<b>Exceeds expectations (4)</b>	<b>Meets expectations (3)</b>	<b>Approaches expectations (2)</b>	<b>Falls below expectations (1)</b>
<b>Argument and Idea Development (30%)</b>	Presents a clear and specific educational issue to explore. Makes a compelling case for examining historical precedents. Generates a clear and compelling idea throughout the essay. The narrative moves from one point to the next logically.	Presents a clear and specific educational issue to explore. Examines historical precedents, but does not make a clear case for doing so. The narrative follows a logical sequence but it may weaken in certain sections. Crafts a general idea, but does not develop it fully.	Presents an overarching topic to explore, but the issue is vague or too large. Does not examine historical precedents. Lacks a clear logic. Offers claims but fails to generate an overarching idea.	Topic is vague or unclear. Offers summaries of events and texts but does not provide an analysis or craft an original idea. Lacks a discernible logic.
<b>Historical Inquiry (30%)</b>	Accurately examines specific historical eras and developments through the use of evidence. Offers a careful analysis of evidence, moving beyond a summary. Uses at least 10 sources. Uses quotes from other scholarship to develop and shade the essay's ideas.	Examines historical eras and developments. Uses at least 10 sources. Provides evidence, but does not fully analyze all pieces introduced. Larger idea of the essay is only tangentially related to evidence introduced.	Offers a partial or incomplete exploration of historical eras and developments. Uses some evidence, but leaves it largely unexamined. Does not use and/or incorrectly cites 10 sources. Relies on summary rather than analysis.	Examination of history is partial or inaccurate. Does not use evidence to substantiate claims. Does not use 10 sources. Unclear how history relates to essay's larger idea.
<b>Conclusions: The Intersection of History &amp; Policy (30%)</b>	Considers the ways in which history and historical developments inform policy surrounding a particular educational issue. Examines moments of continuity and change. Uses the history presented to offer fresh insights surrounding a current educational issue. Examines the significance of the essay's idea in compelling and meaningful ways.	Considers the connections between the past and present but does not consider implications of such connections. Attempts to use history to cast fresh light on policy, but claims need to be developed more fully to be compelling or clear. Needs to link these observations to larger idea with greater care.	Considers connections between past and present but does not consider larger implications. Does not use history to make fresh observations about current issue. Connections to larger idea are vague.	Does not consider the connections between the past and present. Does not use historical inquiry to make fresh observations about current issue. Does not generate a larger idea and examine its significance.
<b>Mechanics (10%)</b>	The essay is nearly error free.	The paper has some errors.	The paper has numerous errors.	The paper is sloppy and appears not to have been proofread.

## Assessment Rubric for Class Participation

**25 Points**

	<b>Exceeds expectations (4)</b>	<b>Meets expectations (3)</b>	<b>Approaches expectations (2)</b>	<b>Falls below expectations (1)</b>
<b>Attendance (30%)</b>	Exemplary attendance and tardies	Near perfect attendance, few tardies	Occasional (2-3) absences and/or tardies	Frequent absences and/or tardies
<b>Quality of Questions and Interaction (20%)</b>	Most queries are specific and on point. Deeply involved in class dialogue. Challenges ideas and 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. Infrequently discusses ideas.	Rarely asks questions of substance.
<b>Effort (20%)</b>	Volunteers as appropriate and often leads in group settings. Engages and brings out the best in others.	Willingly participates with instructor and classmates. Engages others.	Reluctantly participates when asked. Seeks easiest duties in groups. Tolerates others.	Actively avoids involvement when possible. Complains about others. Uses large set of excuses.
<b>Demonstration of preparation for class (30%)</b>	Demonstrates preparation regularly by referring to previous learning, text and other sources to contribute to class discussion and is prepared for each and every class.	Demonstrates preparation regularly by referring to previous learning, text and other sources to contribute to class discussion.	Demonstrates periodic preparation and readiness for class.	Rarely demonstrates readiness for class.