

EEA 525: School Finance and Operations

School of Education and Leadership

3 Credits

Effective Date 1/1/2023

Access to the Internet is required.

All written assignments must be in Microsoft-Word-compatible formats.

See the library's APA Style Guide tutorial for a list of resources that can help you use APA style.

Faculty Information

Professional experience information for instructors is found under *Faculty Information* in the online course menu.

Contact Information

Contact information for instructors is found under *Faculty Information* in the online course menu.

Course Description

In this course, candidates develop an understanding of how schools are financed and knowledge of best practices in the acquisition of resources, budgeting, accounting, and the fiscal stewardship of the school's human and financial resources. Topics include the formulation of the budget, the development of budget priorities, the administration of budget expenditures, the school's facilities, and financial resources. Candidates become knowledgeable about the budgeting process and the school financial management responsibilities of the educational leader.

Course Resources

Required and recommended resources to complete coursework and assignments are found on the course [Reading List](#). Access is provided through the *Reading List* link in your online course as well as from the library homepage (“Find Your Reading List” button).

Note: Required resources that must be purchased by the student are tagged “Purchase from a vendor of your choosing.” Required resources with a direct link, “Available through CityU Library”, are available electronically at no cost to students.

Students in Canada may purchase course resources from the [Canada Bookstore](#), and students outside the U.S. and Canada should contact their advisor or textbook coordinator for additional information.

Course Outcomes

This course will prepare students to:

- Evaluate the school system's practices in setting priorities for budget development within federal and state regulations
- Apply sound financial practices in developing budgets
- Evaluate staff, parent, and community involvement related to development of the school's budget

Core Concepts, Knowledge, and Skills

- Apportionment formula
- Basic education funding
- Capital projects fund
- Direct and indirect expenditures
- Federal revenues and support
- Fiscal stewardship
- General fund
- Local effort assistance funding
- Maintenance of school buildings and grounds
- Policy and political influences
- School safety
- Special education funding
- Student body fund
- Tax revenues (country and local)

Grading Scale

The grades earned for the course will be calculated using City University of Seattle’s decimal grading system, found in the current University Catalog (<https://www.cityu.edu/catalog/>).

Grading rubrics with details on how each assignment will be graded are located under *Assignments* and/or in *My Grades* in the online course menu. Students should review the rubric for each assignment prior to completing their work in order to understand how it will be assessed.

Course Assignments and Grading

CityU’s Standard Graduate Rubric Scale

| | | | | | |
|------------|---------------------------|----------------|----------------------|----------------|------------------|
| % of Grade | Graduate Percentage Scale | 0.00 - 68.74% | 68.75 - 86.24% | 86.25 - 93.74% | 93.75 - 100% |
| | Graduate Scaled Score | 0.0 - 1.5 | 1.6 - 2.9 | 3.0 - 3.5 | 3.6 - 4.0 |
| | | Below Standard | Approaching Standard | At Standard | Exceeds Standard |

Participation (20% of Final Grade)

Students participate in independent and group activities as well as in-class and online activities of this course. Students also provide reflection and analysis of questions brought forward by the instructor, as well as your response to the postings of your classmates.

| Components | % of Grade |
|--------------------------------|-------------------|
| Presence in the Discussion | 30% |
| Content and Cognition | 40% |
| Oral and Written Communication | 30% |
| TOTAL | 100% |

Reflection Reports on School and District-level Budget (30% of Final Grade)

The candidate interviews a school administrator and a central office supervisor or, in larger districts, the central administrative officer who serves as the financial officer for the school or program. The purpose of the interview is to learn the cycle of analysis that ensures efficient and effective systems and management of the organization: What the leaders consider important for school or program administrators to know and be able to do regarding school/program finance, management, and district-level budgeting; how school administrators are expected to participate in the budgeting process and fiscal routines; how priorities are established and maintained; and how to demonstrate fiscal responsibility.

Prepare a three- to five-page written reflection of each interview and identify professional growth goals related to ensuring management of the organization, operations, and resources for a safe,

efficient, and effective learning environment. The instructor determines an appropriate mode for presentation of reports to the class.

| Components | % of Grade |
|---------------------|-------------------|
| Content | 50% |
| Voice and Support | 25% |
| Audience Engagement | 25% |
| TOTAL | 100% |

Analysis and Summary of Content and Financial Impacts of a Collective Bargaining Agreement (20% of Final Grade)

The candidate demonstrates an understanding of the importance of collective bargaining agreements to instruction, operations, capital improvements, professional development, etc. Strategies for win-win bargaining as well as more traditional models, problem-framing and problem-solving, group process and decision making are addressed. Use a current contract from one's local schools to identify the needs of the school community, school and/or program to include the allocation of resources (revenues, time, and materials). Append a copy of the bargaining agreement(s) to the analysis.

The analysis and summary is an APA formatted paper not to exceed five (5) pages. (If collective bargaining is not a factor in one's setting, gain instructor approval for an appropriate topic for analysis and summary.)

| Components | % of Grade |
|-------------------|-------------------|
| Voice | 25% |
| Content | 50% |
| Engagement | 25% |
| TOTAL | 100% |

Financial Management of the Learning Environment (30% of Final Grade)

Administrators are expected to lead a collaborative process to develop and manage the budget that promotes the current and future success and well-being of each student and adult. The budget must be student-focused, based on the prioritized and targeted interventions necessary to enhance student learning (usually expressed through a school learning improvement plan), and use available resources to maximum positive effect. The candidate gathers and analyzes data to determine whether and how the budget, operations, and other systems in the school or program work to create a safe, efficient, equitable, and effective learning environment. The candidate analyzes a current school learning improvement plan, its systems for allocation of revenues, expenditures, time, human and material resources. The candidate reflects upon alignment of resources with the student learning improvement goals. The candidate references the data and artifacts and evaluates to what extent these systems work to support a safe, efficient, equitable, and effective learning environment. Based on the analysis, reflection, and evaluation, the candidate recommends changes in resource allocation(s) and/or in goals for student learning improvement. Frame the data-driven rationale and recommendations for presentation to a school or program leadership team.

| Components | % of Grade |
|--|-------------------|
| Context | 25% |
| Description, Analysis, and Recommendations | 50% |
| Communication | 25% |
| TOTAL | 100% |

Course Policies

Late Assignments

On-time completion and turn-in of assignments is the expectation, so plan your work accordingly. Late work will receive an automatic deduction and/or revised due date, determined by the instructor on a case-by-case basis.

Participation

Whether in class, online, or in a mixed mode setting, students will be graded on their participation in discussions; their ability to present, explain, or defend alternative viewpoints; and the degree to which they have mastered the concepts and principles inherent in the study of educational leadership. Written work will be assessed not only on relevance to the subject presented, but also on adherence to good written form and professional presentation.

Professional Writing

Assignments require error-free writing that uses standard English conventions and logical flow of organization to address topics clearly, completely, and concisely. CityU requires the use of APA style.

University Policies

Students are responsible for understanding and adhering to all of City University of Seattle's academic policies. The most current versions of these policies can be found in the [University Catalog](#) that is linked from the CityU Web site.

Antidiscrimination

City University of Seattle and its staff and faculty are committed to supporting our students. We value equity, diversity, and inclusion as a way of life as well as the educational opportunities it provides. City U will not tolerate any form of discrimination based on race, color, ethnicity, sexual orientation, gender identification, socioeconomic status, or religious values. If you have experienced any discrimination based on any of the above, we encourage you to report this to the University. Please report this to your instructor. If you do not feel safe reporting this to your instructor, please report to the Provost or to the Vice President of Student Affairs.

Non-Discrimination & Prohibition of Sexual Harassment

City University of Seattle adheres to all federal, state, and local civil rights laws prohibiting discrimination in employment and education. The University is committed to ensuring that the education environment is bounded by standards of mutual respect and safety and is free from discriminatory practices.

In the U.S., the University is required by Title IX of the Education Amendments of 1972 to ensure that all of its education programs and activities do not discriminate on the basis of sex/gender. Sex include sex, sex stereotypes, gender identity, gender expression, sexual orientation, and pregnancy or parenting status. Sexual harassment, sexual assault, dating and domestic violence, and stalking are forms of sex discrimination, which are prohibited under Title IX and by City University of Seattle policy. City University of Seattle also prohibits retaliation against any person opposing discrimination or participating in any discrimination investigation or complaint process internal or external to the institution. Questions regarding Title IX, including its application and/or concerns about noncompliance, should be directed to the Title IX Coordinator. For a complete copy of the policy or for more information, visit the [CityU website](#) or contact the Title IX Coordinator.

In Canada, in compliance with the British Columbia Human Rights Code, the Alberta Human Rights Act, WorksafeBC, and the Workers' Compensation Board of Alberta, the University believes that its environment should at all times be supportive and respectful of the dignity and self-esteem of individuals. Discrimination, harassment and bullying conduct, whether through person-to-person behaviour or via electronic communications such as email or social media is not acceptable and will not be tolerated. As an educational institution, it is our responsibility to cultivate an environment of excellence, equity, mutual respect and to recognize the value and potential of every individual. The University will take all necessary steps to meet or exceed the requirements of the law to prevent discrimination, harassment and bullying. The Respectful Workplace Policy for the prevention of discrimination, harassment and bullying policy and procedure can be found at [CityU in Canada](#) website.

Religious Accommodations

City University of Seattle has a policy for accommodation of student absences or significant hardship due to reasons of faith or conscience, or for organized religious activities. The University's policy, including more information about how to request an accommodation, is available in the University Catalog and on the my.cityu.edu student portal. Accommodations must be requested by the 20% mark of this course (e.g. day 14 of a ten-week course, day 7 of a 5-week course) using the Religious Accommodations Request Form found on the student dashboard in the my.cityu.edu student portal.

Academic Integrity

Academic integrity in students requires the pursuit of scholarly activity that is free from fraud, deception and unauthorized collaboration with other individuals. Students are responsible for understanding CityU's policy on academic integrity and adhering to its standards in meeting all course requirements. A complete copy of this policy can be found in the [University Catalog](#) under *Student Rights and Responsibilities* on the page titled *Academic Integrity Policy*.

Attendance

Students taking courses in any format at the University are expected to be diligent in their studies and to attend class regularly.

Regular class attendance is important in achieving learning outcomes in the course and may be a valid consideration in determining the final grade. For classes where a physical presence is required, a student has attended if they are present at any time during the class session. For online classes, a student has attended if they have posted or submitted an assignment. A complete copy of this policy can be in the [University Catalog](#) under *Student Rights and Responsibilities* on the page titled *Attendance*.

Final Assignment Due Date

Final assignments for each class at CityU must be due on or before the final date of the course as indicated in the university's course information system. Due dates that extend beyond the final date of the course may negatively impact tuition funding for students.

Support Services

Disability Services Accommodations Statement

Students with a documented disability who wish to request academic accommodations are encouraged to contact Disability Support Services to discuss accommodation requests and eligibility requirements. Please contact Disability Support Services at disability@cityu.edu or 206.239.4752 visit the [Disability Support Services](#) page in the my.cityu.edu portal or in the *Start Your Course Here* module in your course under *Support Services*. Confidentiality will be observed in all inquiries. Once approved, information about academic accommodations will be shared with course instructors.

Library Services

CityU librarians are available to help students find the resources and information they need to succeed in this course. Contact a CityU librarian through the [Ask a Librarian](#) service, or access [library resources and services online](#), 24 hours a day, seven days a week.

Online Tutoring

CityU students have access to free online tutoring offered through Brainfuse, including writing support, from certified tutors 24 hours a day, seven days a week. Visit the [Brainfuse](#) page on the my.cityu.edu portal for more information.

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