

EEA 547: HR and Finance Management

School of Education and Leadership

3 Credits

Effective Date 7/1/2024

Grading Type: Decimal

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 *Syllabus, Schedule, and Course Team* in the online course menu.

Contact Information

Contact information for instructors is found under *Syllabus, Schedule, and Course Team* in the online course menu.

Territorial Acknowledgment & Statement of Inclusion

Lands Acknowledgment

We acknowledge that the main site of City University of Seattle occupies indigenous land: the traditional and unceded territory of Coast Salish peoples, specifically the Duwamish Tribe. We serve online candidates who live and work on the traditional and unceded territories of other indigenous peoples in various parts of Washington and North America. We are all encouraged to learn about and honor tribes whose traditional lands our lives and work occupy.

Equity Mission

Our shared mission is to develop ourselves as culturally competent leaders of similarly dedicated educators and staff. Together, we strive to serve candidates of all diverse races, cultures, and descriptions responsively and responsibly.

- We establish and maintain positive and productive relationships. We engage in effective verbal and nonverbal interactions to capitalize on strengths and assets.
- We create inclusive environments that support learning. We pursue racial justice.
- We use knowledge and skills to eradicate racism, oppression, and inequity in classes, internship, and program. We do this so that every candidate of every description can learn and strive toward their highest potential, nurtured by faculty who value them as individuals, honor their culture, empathize with their story, and support them toward realization of their possibilities and dreams.

“Equity IS the work” that enables each and all candidates to achieve excellence.

Course Description

Candidates develop professional capacities and cultural competence to staff and resource a focus school or program for excellence and equity, as aligned with school and program improvement goals, and to budget and monitor progress for maximum positive impact within allocation. Topics include school finance; budget planning and management, and evaluation; human resources functions in job analysis, recruitment, selection, induction, mentoring, growth, advancement, and separation; and relevant laws, policies, procedures, and contracts. This course gives candidates human resources and budget skills needed to lead as school principals, program administrators, and CTE directors.

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 prepares students to:

- CO1 - Apply human resources practices that support achievement of school or program mission and improvement goals.
- CO2 - Evaluate, develop, and advocate for a data-informed and equitable resourcing plan that supports school or program mission and improvement goals within budget and other allocations.
- CO3 - Project leadership capacity for planning, communication, and persuasion to a professional audience.

Core Concepts, Knowledge, and Skills

- Analysis of staffing needs
- Law, policies, regulations, and best practices pertaining to the management of human resources, including employees, families, partners, and volunteers

- Recruitment, selection, hiring, and induction of new employees
- Coaching, mentoring, supervising, and evaluating staff
- Collective bargaining agreements, employee relations, employment discrimination
- Integrity and professional code of conduct
- Professional growth and professional growth plans
- Separation (temporary and permanent): leave of absence, discipline, administrative leave, non-renewal, dismissal, retirement, etc.
- Unsatisfactory, Basic, Proficient, and Distinguished performance ratings; performance standards; probation
- Change management theory and frameworks
- Education finance: State, federal, local
- Apportionment formula
- Basic education funding
- Capital projects fund
- Tax revenues (country and local)
- Budget management of school or program: Fiscal stewardship
- Equitable resourcing
- General fund
- Direct and indirect expenditures
- Budget implications of law, policy, bargained agreements
- Maintenance of school buildings and grounds
- School safety
- Special education funding
- Student body fund

Program Outcomes

Learning activities in this course enable students to integrate proficiency in many or all program outcomes. Concepts, knowledge, and skills developed in this course align strongly with the following administrator certification standards.

For Principal and Program Administrator Certifications: NELP Building-Level Standards

- Standard 6 – Operations and Management
- Standard 7 – Building Professional Capacity
- Standard 2 – Ethics and Professional Norms
- Standard 3 – Equity, Inclusiveness, and Cultural Responsiveness

For CTE Administrator Certification: CTE Director Competencies

- Competency I.3 – Ability to develop a culture of coherent instructional programs
- Competency I.5 – Demonstration of ethics, integrity, and fairness in decision making

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](#).

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

Graduate Values

	Exceeds Standard	At Standard	Approaching Standard	Below Standard
Overall Score Row Value	92	85	75	0
Value Range	100-92	91-85	84-75	74-0
Decimal Range	4.0-3.7	3.6-3.0	2.9-2.0	1.9-0.0

Personalized Assignment Completion, Grading, and Feedback

In the Educational Leadership program, faculty encourage candidates to personalize their approaches to required assignments in ways that align with their background and unique combination of intended certification(s), degree, career goals, and work context. To help faculty personalize grading and feedback on assignments, on the page following the title page of each written assignment, candidates are invited to insert a Career Context description that concisely covers: Degree and certification(s) you are seeking; leadership position(s) you are pursuing; levels of school(s) in which you plan to work as a leader (elementary, middle, or high P-12, district office, higher education, other); current work assignment and roles; other information that might be important for the faculty to understand; and particular kinds of feedback you would like to receive. We advise candidates to use a standard paragraph for all assignments and revise as appropriate for specific assignments. For additional information, see the Personalized Assignment Completion, Grading, and Feedback topic in the course shell. Ed Leadership faculty want to support your development in ways that help you succeed in your leadership roles.

Overview of Required Assignments	% of Final Grade
Participation	20%
Management Plan - Part 1: Human Resources	30%
Management Plan - Part 2: Financial Management of the Learning Environment	30%
Presentation of Management Plans	20%
TOTAL	100%

Participation (200 points, 20% of Final Grade)

Participation fosters interactive learning and meaningful synthesis of course content considering multiple perspectives and contexts. Candidates engage with faculty and classmates in a mix of synchronous and asynchronous activities that reflect the class’s delivery mode (Online, Mixed-Mode, In-person). Examples of synchronous activities include in-person class discussions and activities, check-in conversations, webinars, and other activities that occur simultaneously in the same physical or electronic space and time. Examples of asynchronous activities include online discussions, blogs, Wikis, and other remote interactions that develop over time. All forms of participation have expectations for timely and ample engagement, meaningful contribution, and professional communication. The faculty defines expectations for each form of engagement. The instructor scores Participation weekly.

Each week in an Online (ON) course requires participation in a Zoom class or discussion forum. For an Online Synchronous (OS) course, participation involves more time in required Zoom classes and fewer online discussions. For a timeline of these participation activities, see the Course Schedule.

Components	% of Grade
Presence and Engagement	40%
Content and Cognition	40%
Oral and Written Communication	20%
TOTAL	100%

Assignments Note: The three major assignments in this course were intentionally designed as interrelated human resources (Part 1) and budgeting (Part 2) components of annual school improvement planning that principals and program administrators lead in schools and programs. The third part is a presentation of the HR and Budget plans, in which candidates describe, show

the relationships between plans, and advocate for their plan, such as an administrator might present to a leadership cabinet or to the school or program staff. The adopted process that a particular school, district, or program uses may differ, but the core purposes, mindsets, and skills apply.

Human Resources Management Plan (300 points, 30% of Final Grade)

School principals and program administrators hire, supervise, and develop staff and manage budget and other resources to maximize well-being, equitable opportunities, and learning outcomes for all students. In this assignment, the candidate identifies and describes a focus school or program, interviews and collects resources from the HR director, school principal and/or program director and develops the Human Resources Management Plan to staff the school for equity and excellence based on analysis of data.

Additionally, the HR Management Plan includes as appendices a collection of 5 or more resources or tools that the candidate finds helpful in performing role-related HR functions. Suggested artifacts include HR Manual, forms, protocols, needs assessments, job descriptions, procedures, interview questions, emails, communications, recruitment brochures, job postings, compensation schedules, contracts and negotiated agreements, training documents, checklists, website links, resources, links to online tools and resources, supervision and evaluation procedures and timelines, surveys, reports, list of who to call for advice and emergency support in key operational departments.

Together, this HR Management Plan and the Financial Management of the Learning Environment assignment are major components of a larger school or program management plan.

Sections of this Human Resources Plan (Part 1) include:

- Title Page
- Career Context
- Description of Focus School or Program and Learning Context
- Description of the District's HR Staffing Procedures for Focus School or Program
- Staffing Configuration
- Anticipated Staffing Needs, Including Diversity, Equity, and Excellence
- Plan to Fulfill Staffing Needs
- On-boarding and Mentoring
- Professional Development
- Factors Affecting Staffing Over Four-year Planning Cycle
- Evaluation
- Reflection on Learning
- References

- Appendices

For more detailed guidance, see the Human Resources Management Plan template attached to this assignment in the Brightspace course shell.

Components	% of Grade
Current Staffing Configuration of Focus School or Program	40%
Anticipated Staffing Needs and Plan to Address Needs	40%
Reflection and Communication	20%
TOTAL	100%

Financial Management of the Learning Environment (300 points, 30% of Final Grade)

Effective school and program administrators 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 and addresses school or program improvement goals. 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 within budget allocation.

To prepare for this assignment, the candidate interviews a principal or program director and district budget director, collects budget resources, gathers and analyzes data to determine ways and extents to which the budget, operations, and other systems in the school or program work to create a safe, efficient, equitable, and effective learning environment. Resources to be gathered and analyzed include the current school or program learning improvement plan, the current school or program budget, and district guidelines for its systems of allocation of revenues, time, and human and material resources.

The candidate analyzes and reflects upon alignment of resources with the student learning improvement goals. The candidate references relevant data and artifacts and evaluates to what extent these systems work to support a safe, efficient, equitable, and effective learning environment, particularly as demonstrated by state assessments and teacher evaluation and performance. The candidate analyzes factors that impact annual budgets from year to year, such as changes in state, federal, and local funding, and collective bargaining agreements. Based on the analysis, evaluation, and reflection, the candidate recommends changes in resource allocation(s) and/or in goals for student learning improvement. In the narrative, the candidate discusses cites, references, and appends resource documents used to develop this financial management plan.

Because the human resources and finance functions are so closely related to the operation of a school or program, the focus school for this Financial Management Plan must be the same as for the Human Resources Management Plan.

Sections of this Financial Management Plan include:

- Title Page
- Career Context

- Description of Focus School or Program and Learning Context
- Description of the District’s Budget Process for the School or Program
- Revenue: Budget Allocation to School or Program
- Expenses: Allocation of Expenses, Including Diversity, Equity, and Excellence
- Factors Affecting Budget Planning Over Four-year Planning Cycle
- Evaluation and Recommended Changes
- Reflection on Candidate’s Learning
- References
- Appendices

For more detailed guidance, see the Financial Management Plan of the Learning Environment template attached to this assignment in the Brightspace course shell.

Components	% of Grade
Current Budget of Focus School or Program	40%
Recommendations for Budget Revisions	40%
Communication	20%
TOTAL	100%

Presentation of the Management Plans - (200 points, 20% of Final Grade)

School and program administrators must demonstrate capacities to communicate to a variety of audiences concise, informative, compelling, and professional presentations of the staffing, budget, and other plans that they propose to implement. The audience for this presentation is a mixed audience of focus school or program staff, a fellow principal, and a district administrator. The presentation concisely identifies and describes the focus school or program, summarizes the staffing plan, budget plan, and rationale behind them. The presenter inspires audience confidence that the plans will achieve improved results on learning goals and key measures. In such short presentations, effective visuals are key to communicate complex information simply and quickly. Effective presenters project professionalism and inspire confidence and cooperation.

The presentation covers essential components and rationale of the plan in 6-8 minutes.

Components	% of Grade
Overview of Plans and Artifact(s)	60%
Communication	40%
TOTAL	100%

Course Policies

Late Assignments

On-time completion and submission of assignments is the expectation, so candidates should plan work accordingly. Candidates who anticipate submitting work late because of circumstances beyond their reasonable control are expected to contact the instructor in advance, to explain the reason(s) for lateness, and to propose a revised due date. Late assignments that do not meet these communication requirements are subject to a 10% deduction. This policy parallels professional workplace expectations that value on-time completion or advance communication that facilitates a revised timeline.

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 [Title IX](#) portal page 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 the [CityU website](#) under the Policies section or 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 or visit the [Disability Support Services](#) page in the my.cityu.edu portal. 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.

Smarthinking Tutoring

CityU students have access to free online tutoring offered through Smarthinking, including writing support, from certified tutors 24 hours a day, seven days a week. Contact CityU's Student Support Center at mycityusupport@cityu.edu to request a user name and password.