This course is designed to prepare students to meet the following Utah Educational Leadership Standards:

Strand 3: Management for Learning

Standard 3.1: Manage staff resources, including the assignment of teachers and staff to roles and responsibilities in order to optimize their professional capacity to equitably address each student’s learning needs.

Standard 3.2: Seek, acquire, and manage fiscal, physical, and other resources to support the school’s vision, mission, and values.

Standard 3.3: comply with mandated budget and accounting practices as responsible and ethical stewards of the school’s monetary and non-monetary resources.

Standard 3.6: Follow LEA policies, Utah State Code, and Utah State Board of Education rules governing the human resource function, including remediation and/or termination of faculty and staff employment as needed.

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| Module | Title | Objectives | Activities |
| Week 1  Jan 7 | Welcome & Orientation | Identify and articulate   * What is included in the course * Assignments and deadlines * Course resources including classmates |  |
| Week 2  Jan 14 | Economic Benefits of Education | Identify and articulate   * the contribution of education to the economy * measures of educational resource needs * federal, state, and local purposes in the funding of public education | Reading:  K-12:   * National Center for Educational Statistics <http://www.nces.ed.gov>   HE:   * Economic Facts <https://www.brookings.edu/wp-content/uploads/2017/04/thp_20170426_eight_economic_facts_higher_education.pdf>   Reading Quiz: Week 2  Assignment:   * Create a 3-5 minute presentation on how education is important to society and worth the cost |
| Week 3  Jan 21\* | Financial Equity and Ethics | Identify and articulate   * Audits of finances and resources * Transparency of costs * Equity of opportunity | Reading:  All:   * <https://files.eric.ed.gov/fulltext/EJ1169361.pdf> School Finance as a Moral Dilemma   K-12   * <https://files.eric.ed.gov/fulltext/EJ914668.pdf> Litigation and School Finance: A Cautionary Tale   HE:   * HE Federal Financial Aid <https://robertkelchen.com/2017/07/10/my-2017-higher-ed-finance-reading-list/> (13:17) * Politics of Student Aid <http://www.aei.org/wp-content/uploads/2013/06/-kelly-madzelandan_085407140605.pdf>   Assignment:   * Reflection paper: What are the principles that should guide equitable school finance? How do we keep the system transparent? |
| Week 4  Jan 28 | State/University Funding | Identify and articulate   * major sources of funding of public education * major sources of taxation used to support public schools * the role of social and community agencies | Reading:   * <https://le.utah.gov/interim/2018/pdf/00002208.pdf> 2018-2019 State Budget   K12:   * <https://www.greatschools.org/gk/articles/the-ins-and-outs-of-school-finance/> The ins and outs of school finance. * <https://files.eric.ed.gov/fulltext/ED087121.pdf> New Methods of Financing Public Education   HE:   * Financing Public Higher Education: Variations Across States <https://www.urban.org/research/publication/financing-public-higher-education-variation-across-states/view/full_report> * State-level responses to the access and completion challenge in the new era of austerity. <https://www-jstor-org.dist.lib.usu.edu/stable/pdf/24541751.pdf?refreqid=excelsior%3Aba6987cd08944c676e6e43c232c8a5f6>   Assignment:   * K12: Reflection paper: Analyze the state’s education budget identifying legislative priorities. Identify areas that are not addressed adequately or equitably. * HE: Reflection paper analyzing various tuition and fee models (differential tuition, course fees, mandatory fees, housing, books) for adequacy and equity. |
| Week 5  Feb 4 | Budget Basics: Line items and local income | Identify and articulate   * how budgets are structured * fees | Reading:  K12:   * Budget Guide <https://edsource.org/wp-content/publications/UnderstandingSchoolDistrictBudgets.pdf>   HE:   * USU 2018 Budget <https://www.usu.edu/budget/pdfs/factsfigures/2017-18%20budbook%20budget%20summaries.pdf> * Steps by step guide for reading a budget <https://clas.ucdenver.edu/orca/sites/default/files/attached-files/fiancial_statement_review_1.pdf>   Assignment:   * Create a graphic organizer for key vocabulary from the reading * Create procedure outline for collecting money |
| Week 6  Feb 11 | District/Department Budgeting | Identify and articulate   * the components of a district or department budget | Reading:   * Reading a District Budget <https://files.eric.ed.gov/fulltext/ED558571.pdf> * HE Becoming a Leader in University Budgeting [http://content.ebscohost.com/ContentServer.asp?EbscoContent=dGJyMMvl7ESeqLQ4zOX0OLCmr1Cep7RSr6q4TbeWxWXS&ContentCustomer=dGJyMPPq34Dx6vNT69fnhrnb4ovf5ucA&T=P&P=AN&S=R&D=pbh&K=48739737#](http://content.ebscohost.com/ContentServer.asp?EbscoContent=dGJyMMvl7ESeqLQ4zOX0OLCmr1Cep7RSr6q4TbeWxWXS&ContentCustomer=dGJyMPPq34Dx6vNT69fnhrnb4ovf5ucA&T=P&P=AN&S=R&D=pbh&K=48739737)   Assignment:   * Analysis of district or department budget using the ASBO standards <https://asbointl.org/asbo/media/documents/learning/Self-Assessment-Prof-Stand.pdf> p 6 |
| Week 7  Feb 18\* | School/Program Budgeting | Identify and articulate   * the components of a school or program budget | Reading:  K12   * Obtain and read copy of a school budget   HE:   * Obtain and read copy of a department or program budget   Assignment:   * Analysis of school or program budget using the ASBO standards |
| Week 8  Feb 25 | Creating a Budget | Identify and articulate   * strategies for creating a program budget * procedures for budget adjustments | Reading:  K12: Making a School Budget <http://schoolofeducators.com/2010/06/making-school-budget/>  HE: Preparing the Department Budget <https://www.rit.edu/academicaffairs/facultydevelopment/sites/rit.edu.academicaffairs.facultydevelopment/files/dept_head_resource_files/enneking-budgetprepfmt.pdf>  Assignment:   * Create an alternate program budget based on a new priority * Create a budget change |
| Week 9  Mar 4 | Spending Money | Identify and articulate   * the procedure for expenditure accountability * ways in which leaders can get into financial trouble | Reading:  K12:   * How to Prepare for Your School Audit <https://www.gocodes.com/how-to-prepare-for-your-school-financial-audit>   HE:   * Trends in College Spending <https://files.eric.ed.gov/fulltext/ED568907.pdf>   Assignment:   * Expenditure procedures graphic organizer * Reflection paper: Staying Out of Trouble Scenario |
| Week 10\*  Mar 11 | Spring Break |  |  |
| Week 11  Mar 18 | Gifts, Grants & Contracts | Identify and articulate   * the role of budgets in grant writing * how contracts are used in education | Reading:   * Writing a successful grant proposal and detailed budget <https://tisch.nyu.edu/content/dam/tisch/faculty-services/Writing%20a%20successful%20grant%20proposal%20and%20detailed%20budget.pdf> * A Glimpse into the World of High Capacity Givers <https://www.nber.org/papers/w22099.pdf>   Assignment:   * Create a grant proposal and budget |
| Week 12  Mar 25 | Human Resources | Identify and articulate   * Requirements for screening employees * Meeting training and human-relation needs * Making staffing forecasts (reliable enrollment and personnel projections) and understanding FTEs | Reading:  K12:   * Grid Based School Enrollment Forecasting ppt <https://www.pdx.edu/prc/sites/www.pdx.edu.prc/files/2014_July_ESRI.pptx>   HE:   * College & University Staffing and Human Resources Support Trends <https://www.scranton.edu/pir/planning/Scans%20and%20reports/Microsoft%20Word%20-%20HR%20Staffing%20Trends_2008.pdf>   Assignment:   * K-12: Obtain next-years enrollment projections for your school. Create a staffing plan for next year. * HE: Obtain this year’s teaching load for a program. Create a staffing plan for one less FTE. |
| Week 13  Apr 1  Spring  Break | Employment and Human Resources | Identify and articulate   * Equity and effectiveness of collective bargaining agreements | Reading:   * The Evolution of the Utah Education Association into collective Bargaining in Utah <http://www.myuea.org/Uploads/files/Resources/Research/HistOfCollectBargInUtah.pdf> * District or institution employee agreement   Assignment:   * Review collective bargaining agreement identifying two clauses that are a benefit to the school and two that are not a benefit. * Discuss how you would negotiate changes in at least one of the clauses. |
| Week 14  Apr 8 | Facility Management | Identify and articulate   * Budgeting for building construction * Boundaries | Reading   * Planning and Managing School Facilities <https://ecommons.udayton.edu/cgi/viewcontent.cgi?article=1060&context=eda_fac_pub>   K12:   * Best Practices in District Rezoning <https://www.pps.net/cms/lib/OR01913224/Centricity/Domain/207/Best_Practices_in_District_Rezoning_-_Portland_Public_Schools.pdf>   Assignment:   * Interview a principal or role to which you aspire. What are the services they manage: cleaning, security, parking, utilities. How is school construction both an economic and political issue? * K-12: Create a procedure for school boundary adjustments * HE: Create a procedure to gain approval for program recruiting near another state university |
| Week 15  Apr 15 | Maintenance and Operations  Risk Management | Identify and articulate   * The roles of managing facilities to meet the needs of students and staff * Risk management | Reading:   * Planning Guide for Maintaining School Facilities (Table of Contents, Chapter 4: Providing a Safe Environment for Learning) <https://nces.ed.gov/pubs2003/2003347.pdf>   Assignment:   * Interview a principal or role to which you aspire. Reflection paper: What are the services they manage: cleaning, security, parking, utilities? What procedures are in place to manage risk? |
| Week 16\*  Apr 22 | Finals Week: Assignments Due |  |  |