

UNIVERSITY OF REDLANDS

SCHOOL OF EDUCATION

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COURSE SYLLABUS

Course: EDUC 673
Course Title: School Finance
Term: Spring 2016 (May to July)
Days/Times: Monday: 5:30—8:30pm
Class Location: Gregory 271

Faculty: Dr. Casaundra McNair, Educational Administration Program Coordinator
Cell Phone: (951) 241-4090 (C)
E-mail: casaundra_mcnair@redlands.edu
Office Hours: Immediately before and after class or by appointment

Catalog Course Description

Sound fiscal procedures and budgeting are introduced, including an examination of federal, state and local educational financing. Resource management and setting budgetary priorities at the school site are studied.

Course Objectives

1. Develop the ability to identify revenue sources (LCFF, LCAP, State and Federal Categorical Funded Programs) and expend them in a manner that meets legal requirements. (CAPE 1C, 3A, 3D, 6A, 6C)
2. Understand the basic history of school finance in California. (CAPE 1C, 6A)
3. Understand the various sources of revenue, how they are generated and distributed to address the individual and collective needs of students. (CAPE 1C, 3D, 4C, 5A, 5C, 6A, 6C)
4. Understand how to develop and administer school site budgets. (California Administrative Content Expectations 1C, 3D, 4C, 5A, 5C, 6C)
5. Understand and evaluate the administration of LCFF, LCAP and remaining categorical funds, including how they can be used to enhance the school-wide programs. (CAPE 1C, 4C, 3D, 6A, 6C)
6. Develop a school site budget and populate and track the budget using a spreadsheet provided for you in class. (CAPE 1C, 3D, 4C)
7. Understand and implement the use of technology in field of education finance in support of the school and district-wide vision. (CAPE 1C, 3D, 4C)

Required Readings

Selected Readings on California School Finance 2014-15:

CASBO (California Association of School Business Officials)
<http://www.casbo.org>

FCMAT (Fiscal Crisis & Management Team)
<http://www.fcmat.org>

SSC (School Services of California)
<http://www.sscal.com>

Capitol Advisors
<http://www.capitoladvisors.org>

CSBA (California School Boards Association)
<http://www.csba.org>

EdSource
<http://www.edsource.org>

CDE (California Department of Education)
<http://www.cde.gov>

Student Assessment

Each student will:

1. Be actively involved in the class, participating in discussions, activities and reading assignments. Timely completion is expected. (CAPE 1C, 3A, 3D, 4C, 5A, 5C) (10%)
2. Complete a budget interview with an administrator from your school or department who handles the budget. (CAPE 1C, 3A, 3D, 4C, 5A, 5C) (10%)
3. Using the site budget on your campus, trace all expenditures from each account and categorize each expense according to budget code categories from the current or previous school year on a spreadsheet that will be provided. Create a visual aid (Graph, chart, etc.) to demonstrate where all of the money has been proportionally expended. Summarize your findings in a 4-5 page paper. (CAPE 1C, 3D, 4C, 5A, 5C) (30%)
4. Complete Fieldwork project regarding school finance and write a 3-5 page paper summarizing your experiences and citing outside sources. (CAPE 1C, 3D, 4C, 5A, 5C) (20%)
5. Complete an LCAP analysis presentation. This will be a multi-step process, which we will work on both in and outside of class throughout the semester. (CAPE 3D, 4C, 6A, 6C) (30%)

Grading System/Scale

Evaluation of your work will be based on the following criteria:

A/4.0: All assignments are complete, on time, thorough, well edited, and exceed stated course requirements. All written work shows superior graduate level quality in expression, attention to detail, evidence of originality, organization and reflection. Learning is demonstrated by careful preparation for class, and thoughtful contributions as an individual and group member.

A-/3.7: All assignments are complete, on time, thorough, well edited, and exceed stated course requirements. All written work shows superior graduate level quality in expression, evidence of originality, organization and reflection. Learning is demonstrated by preparation for class, and thoughtful contributions as an individual and group member.

B+/3.3: All assignments are complete, edited, and at least meet all stated course requirements. All written work shows graduate level quality in expression, organization and reflection. Learning is demonstrated by preparation for class, and thoughtful contributions as an individual and group member.

B/3.0: All assignments are complete, edited, and at least meet all stated course requirements. All written work shows graduate level quality in organization and reflection. Learning is demonstrated by preparation for class, and contributions as an individual and group member.

- It is important to realize that grades below 3.0 indicate a problem. The cumulative grade point average must remain at 3.0 or higher, so grades lower than this can affect your degree and/or credential receipt.

B-/2.7: All assignments are complete, edited, and meet most stated course requirements. Written work is slightly below graduate level quality. Preparation for class, and contributions as an individual and group member are slightly below an acceptable level.

- Student should arrange conferences with the professor and advisor to discuss grade performance.

C+/2.3: All assignments are complete and some meet most stated course requirements. Written work is below expected graduate level quality. Preparation for class, and contributions as an individual and group member are slightly below an acceptable level.

- Student should arrange conference with the professor; and a conference with the advisor is required.

C/2.0: Assignments are complete but do not meet stated course requirements. Written work is well below expected graduate level quality.

- A meeting with the professor should be arranged; and a meeting with the advisor is required. The professor will notify the advisor of the grade.

Below 2.0: Grades below 2.0 are not acceptable for credit toward a degree or credential. Further unacceptable grades could lead to the students being dropped from the program. The professor will notify the advisor of the grade.

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### Topic Outline, Readings, Activities- DRAFT subject to change

Meeting 1      **May 2, 2016**  
 Introductions  
 Review course objectives and requirements.  
 FREEWRITE: What do you know about budgets/school finance?  
 Intro to School Finance  
 Read assigned weekly reading

Meeting 2      **May 9, 2016**  
 History: Education in CA: Equity v. Adequacy  
 Begin project planning.  
 Assignments: Work on Interview Assignment;  
 Read assigned weekly reading  
<http://edsources.org/local-control-funding-formula-guide#1>

- Meeting 3      **May 16, 2016**  
 Current Realities of California Education  
 Assignment: Work on Interview Assignment;  
 Begin collecting site budget information  
 Read assigned weekly reading
- Meeting 4      **May 23, 2016**  
 Basic Accounting/Attendance  
 Assignments: Gather district LCAP info  
 Read assigned weekly reading  
 Continue working on site budget assignment  
 Due: Interview with Site Administrator
- Meeting 5      **May 30, 2016**  
Working Session  
 Assignment: Work on LCAP Project Presentations
- Meeting 6      **June 6, 2016**  
 Budget Philosophy & Cash Control  
 California economy effect on school finances  
 Assignment: Work on LCAP info collection  
 Continue working on site budget assignment  
 Read assigned weekly reading
- Meeting 7      **June 13, 2016**  
 Basic Budgeting & LCFF  
 Assignment: Gather LCAP budget data  
 Read assigned weekly reading  
 Continue working on site budget assignment
- Meeting 8      **June 20, 2016**  
 Staffing & Personnel Practices  
 Discuss project progress with group.  
 Assignment: Gather LCAP budget data  
 Read assigned weekly reading  
 Due: Site Budget Analysis Assignment
- Meeting 9      **June 27, 2016**  
 Collective Bargaining  
 Discuss project progress with group.  
 Discuss site staffing ratios  
 Assignments: Work on Final Project Presentation  
 Complete Fieldwork Documentation  
 Read assigned weekly reading: given in class  
 Due: Fieldwork Project
- Meeting 10     **July 11, 2016**  
 ASB Fund Accounting                      & Booster Clubs

Assignment: Work on LCAP Project Presentation

Meeting 11    **July 18, 2016**  
Complete course evaluation  
LCAP Project Presentations

Meeting 12    **July 25, 2016**  
LCAP Project Presentations