Instructors: Armstrong, Carolyn and Czarda, Larry
Phone: 540/636-5480 (Armstrong) and 703/993-8332 (Czarda)
Fax: 540/636-5481 (Armstrong) and 703/993-8360 (Czarda)
E-mail: carmstro@gmu.edu and lczarda@gmu.edu
Address: Dr. Larry Czarda, 10900 University Blvd. MSN5B8, Manassas, VA 20110

Schedule Information
Location: PE 204
Meeting Times: Mondays from 1/26/04 through 5/3/04 from 7:20PM – 10:00 PM. No class meeting on 3/8 because of Spring Break.

Course Description
Explores basic functions in financial and human resource management. Examines the legalities, ethics and politics of resource procurement and allocation. Provides authentic experiences that help participants to better understand tasks typically performed by school leaders.

Student Outcomes
Students will focus on major issues in financial and human resource management at the school and district levels. During this course, candidates will:

1. Identify and discuss major sources of fiscal and non-fiscal resources for schools and districts.
2. Apply major concepts related to financial and human resource allocation and management.
3. Use a site allocation to build a budget that supports school mission and goals.
4. Develop a staffing plan that is consistent with site goals and district guidelines and demographic conditions that impact schools.
5. Assess the effects of their efforts to recruit teacher candidates to their school districts.
6. Evaluate the effectiveness of simulated teacher interviews that are consistent with legal guidelines.
7. Experience their efforts to mediate disputes.
8. Identify and pursue financial resources outside of their districts (required for internship).

Course Materials
Students are required to purchase the sources listed below.

Textbooks:


Supplemental readings will be distributed and assigned throughout the course.
Nature of Course Delivery

Class will be taught through the use of reading, lectures, group activities, presentations, student-sharing, and case studies and will utilize a variety of approaches and learning techniques. During the typical class period, we will take two 10-minute breaks. During the course of the semester, we will have several special topic nights with guest lecturers.

Course Requirements and Procedures

Communication
Students are required to activate and use their GMU e-mail address for this course.

Weather
Students should call 703.993.1000 for information about weather-related cancellations.

Absence From Class
Students are expected to attend every class for its entirety. Emergencies sometimes arise, however. Students who need to be absent from class are expected to notify the instructor in advance by telephone or e-mail and are responsible for all material covered.

Late Work
Students are expected to submit their work on time. No work will be accepted later than one week after it is due. Work submitted late will result in a reduced grade.

Grading
Students will be graded in four categories, with the following weights:

15% Class Participation
20% Midterm exam
25% Final Exam
40% Research Project

Grading Scale
A+ = 100 points
A = 95 - 99 points
A - = 90 - 94 points
B+ = 85 - 89 points
B = 80 - 84 points
B - = 75 - 79 points
C = 70 - 74 points
F = 69 points or below

Course Requirements, Assignments, and Evaluation Criteria

1. Midterm (20%) and Final Exam (25%): Both examinations will incorporate a mix of assessment techniques to include multiple choice, matching, short answer, and essay. The material tested will come primarily from the two texts and other assigned readings. Specific expectations will be covered during the class period prior to each exam.

2. Class Participation (15%): Active participation in weekly class activities (both oral and written) will be expected. Six times during the course of the semester, students will be responsible for sharing a current events item from site, local, state, or national news regarding a course topic. During the entirety of the
course each student will also share four journal articles and four web sites that address a course topic. Class participation points will also be awarded for the weekly completion of glossary terms.

3. Research Project (40%): Students will research and make an oral and written presentation on a current topic relevant to the course, with the topic to be approved by the instructors. A rubric will be provided.

**Students with Special Needs**

Students who require any special accommodations or those with disabilities that may affect their ability to participate fully in the course are encouraged to work with the instructors to ensure their successful participation. This syllabus is subject to change based on the needs of the class. The Americans with Disabilities Act (ADA) prohibits discrimination against individuals with disabilities in the series, programs, or activities of all state and local governments. Under ADA a disability is defined as a physical or mental impairment that substantially limits a major life activity such as: learning, working, walking, speaking, hearing, breathing, and/or taking care of oneself. If a student has a disability and needs course adaptations or accommodations because of that disability, it must be established with the faculty, in writing, at the beginning of the semester so arrangements can be made. Please call the Disability Resource Center for required documentation (703/993-2474).

**Honor Code**

To promote a stronger sense of mutual responsibility, respect, trust, and fairness among all members of George Mason University and with the desire for greater academic and personal achievement, we, the members of George Mason University, have set forth the following code of honor. Any individual who is caught in the act of cheating, attempting to cheat, plagiarizing, or stealing will be brought forth before a council of their peers. In the event that the individual is found guilty, he or she will be punished accordingly. For further information, please refer to the university catalogue or website at [www.gmu.edu](http://www.gmu.edu).

**Course Topics**

1. Revenues, expenditures, and resources—federal, state, local, and other
2. The ethics and politics of resource allocation at the school site and school division levels
3. The role of the local school board in budget development and how/when/what to communicate with members
4. Resource allocation linked to vision, mission, and goals
5. Examine technologies appropriate for school management and business procedures
6. Resource allocation—staffing and budget
7. Resource allocation adjustment in the face of changing circumstances: How do you cut the budget and/or staffing without ignoring vision, mission, and goals?
8. Communicating accurately and persuasively about budget and staffing priorities and decisions
9. Create various staffing patterns based on student groupings, school goals, and desired organizational structures.
10. Legal constraints on and opportunities provided by categorical funding
11. Position and budget control
12. Recruiting licensed staff
13. Interviewing processes, techniques, and constraints (both legal and otherwise)
14. Inspiring and retaining the best faculty
15. Releasing substandard faculty
16. Workplace climate, including security, mediation, and dispute resolution
17. Balancing human and financial constraints, the interests of teachers, and the interests of students
18. Obtaining resources from outside the school division
19. Facilities design process to support teaching strategies and student outcomes
20. Development and financing of school facilities

**Professor Bios**

*Carolyn Armstrong* is currently the middle school principal at Randolph-Macon Academy in Front Royal, VA, where she previously taught history at the upper school for 12 years. She has bachelor's and master's degrees from Mary Washington College and the University of Virginia as well as extensive coursework at Shenandoah University. She is currently pursuing a doctoral degree at the University. She also serves as a board member for the Samuels Public Library and was past board president for the Front Royal Oratorio Society.

*Larry Czarda* is currently the Vice President, Prince William Campus for GMU, and has been with the university for over 20 years, holding a variety of senior positions in finance and administration. Prior to coming to GMU, he served as Finance Director for Fauquier County and as a budget analyst for Prince William County. He is a past president of the Fauquier County School Board and the Fauquier Hospital Board. He is current president of the Fauquier Hospital Foundation Board. He holds a PhD in Public Policy from GMU.
**Proposed Class Schedule:** Be aware that this is a *proposed* schedule and may be altered or adjusted, given class interests in specific topics and pacing of the material.

<table>
<thead>
<tr>
<th>Date</th>
<th>Topics</th>
<th>Readings and Assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan. 26</td>
<td>• Course expectations</td>
<td>For Feb. 2:</td>
</tr>
<tr>
<td></td>
<td>• Syllabus overview</td>
<td>• Read chapters 1 and 2 in Mathis and Jackson</td>
</tr>
<tr>
<td></td>
<td>• Introductions</td>
<td>• Read chapters 1 and 2 in Brimley and Garfield</td>
</tr>
<tr>
<td></td>
<td>• Glossary exercise</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Exploration of texts</td>
<td></td>
</tr>
<tr>
<td>Feb 2</td>
<td>• Revenues, expenditures, and resources</td>
<td>For Feb 9:</td>
</tr>
<tr>
<td></td>
<td>• Cost/Quality relationship in education</td>
<td>• Read chapters 3 and 4 in Mathis and Jackson</td>
</tr>
<tr>
<td></td>
<td>• Education as human capital</td>
<td>• Read chapters 3 and 15 in Brimley and Garfield</td>
</tr>
<tr>
<td></td>
<td>• Resource allocation linked to vision, mission, and goals</td>
<td>• Find, and be prepared to share, a pertinent web site</td>
</tr>
<tr>
<td></td>
<td>• Ethics and human resource management</td>
<td>or journal article</td>
</tr>
<tr>
<td></td>
<td>• The role of HR in running a site</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Human resource “supply and demand”</td>
<td></td>
</tr>
<tr>
<td>Feb 9</td>
<td>• Motivation and management</td>
<td>For Feb 16:</td>
</tr>
<tr>
<td></td>
<td>• Creating and maintaining a “happy” workforce</td>
<td>• Read chapters 7 and 8 in Mathis and Jackson</td>
</tr>
<tr>
<td></td>
<td>• Legal issues and human resources</td>
<td>• Read chapters 6 and 7 in Brimley and Garfield</td>
</tr>
<tr>
<td></td>
<td>• Equity</td>
<td>• Find, and be prepared to share, a pertinent web site</td>
</tr>
<tr>
<td></td>
<td>• Inequalities in financing education</td>
<td>or journal article</td>
</tr>
<tr>
<td></td>
<td>• Staffing and budget concerns</td>
<td></td>
</tr>
<tr>
<td>Feb 16</td>
<td>• Recruiting, interviewing, and hiring qualified staff</td>
<td>For Feb 23:</td>
</tr>
<tr>
<td></td>
<td>• Local control and education</td>
<td>• Read chapter 11 and 6 in Mathis and Jackson</td>
</tr>
<tr>
<td></td>
<td>• Local, state, and federal responsibility</td>
<td>• Read chapters 4 and 5 in Brimley and Garfield</td>
</tr>
<tr>
<td></td>
<td>• Patterns for developing school finance systems</td>
<td>• Find, and be prepared to share, a pertinent web site</td>
</tr>
<tr>
<td></td>
<td>• Sources of revenue for financing education</td>
<td>or journal article</td>
</tr>
<tr>
<td></td>
<td>• Performance management and job appraisals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Job analysis</td>
<td></td>
</tr>
<tr>
<td>Feb 23</td>
<td>• Decide on a project topic and prepare a 1-page précis</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| March 1 | • Midterm exam review  
• Employee rights  
• Employee handbooks  
• Managing a budget  
• The business of running a school | For March 15  
• No assignments. Study for Midterm Exam. |
| --- | --- |
| March 15 | MIDTERM EXAM | For March 22  
• Read chapters 12 and 13 in Mathis and Jackson  
• Read chapters 11 and 10 in Brimley and Garfield  
• Find, and be prepared to share, a pertinent web site or journal article |
| March 22 | • The public funding of private schools  
• Financing school facilities  
• Compensation strategies | For March 29  
• Read chapters 14 and 15 in Mathis and Jackson |
| March 29 | • Employee benefits  
• Health, safety, and security in the workplace | For April 5  
• Find, and be prepared to share, a pertinent web site or journal article |
| April 5 | • Balancing human and financial considerations and constraints, as well as the interests of all constituents. How do we make this all work? | For April 12  
• Find, and be prepared to share, a pertinent web site or journal article |
| April 12 | • In-class interviewing role-play  
• In-class budget exercise | For April 19  
• Find, and be prepared to share, a pertinent web site or journal article |
| April 19 | • Project Presentations | For May 3  
• Final draft of research project due 5/3 |
| April 26 | • Project Presentations | For May 3  
• Final draft of research project due 5/3 |
| May 3 | • Final Exam Review  
• Project Presentations | **You are encouraged to read unassigned chapters from both texts at your own pace. They will serve as a resource to your understanding the course topics.** |
| May 10 | FINAL EXAM | For May 3  
• Final draft of research project due 5/3 |
**Relationship of Student Outcomes to Program Goals**

This course introduces candidates to major issues and practices in financial and human resource management as part of the Education Leadership licensure sequence. All of the program goals are active, to a greater or lesser degree, in this course. Students will:

- Engage in reflective practice with regard to financial and human resource management.
- Strengthen and improve their communication skills through simulation, class discussion, and paper writing.
- Understand how resource allocation supports or inhibits cultural, economic, and learning diversity.
- Reflect on the ethical implications of resource allocation choices in schools and school districts.
- Use computers for communication, data analysis, and data presentation.

The table below shows the Virginia competencies and Interstate School Leaders Licensure Consortium (ISLLC) standards addressed by this course. See the list of topics at the end of the syllabus for topic references.

Relevant NCATE guidelines: Strategic Leadership (1.1, 1.4, 2.1, 2.2) Instructional Leadership (3.8, 4.5, 4.6) Organizational Leadership (6.3, 7.2, 8.1, 8.2, 8.3, 9.2, 9.3) Political and Community Leadership (10.2, 11.7)

<table>
<thead>
<tr>
<th>VADOE STANDARDS</th>
<th>ISLLC STANDARDS</th>
<th>NCATE STANDARDS</th>
</tr>
</thead>
</table>
| 1. Knowledge and understanding of student growth and development d. Diversity and its meaning for educational programs **Course topics 9-11, 13** | 2. Vision  
  • Learning goals in a pluralistic society  
  • The principles of developing and implementing strategic plans  
  • Information sources, data collection, and data analysis strategies  
  • Effective communication  
  • Effective consensus-building and negotiation skills **Course topics 2-6, 9-12, 14, 15** | 2. Information management and evaluation  
  2.1 Conduct needs assessment by collecting information on students, staff, environment, etc.  
  2.2 Use qualitative and quantitative data to form decisions, to plan and assess school programs, to design accountability systems, etc. **Course topics 1, 3-5, 14** |
| 2. Knowledge and understanding of systems and organizations a. Systems theory and the change process of systems, organizations, and individuals b. The principles of developing and implementing strategic plans | 3. School Culture and Instructional Program  
  • Diversity and its meaning for educational programs  
  • The change process for systems, organizations, and individuals  
  • The role of technology in promoting student learning and professional growth | 3. Curriculum, instruction, supervision, and the learning environment  
  3.8 Use various staffing patterns, student grouping plans, class scheduling forms, etc. to support various teaching strategies and desired student outcomes **Course topics 3, 4, 5, 8** |
### VADOE STANDARDS

| Course topics 1-9, 13-14 |

### ISLLC STANDARDS

| Course topics 2-6, 9-14 |

### NCATE STANDARDS

| Course topics 8-13 |

---

**3. Knowledge and understanding of theories, models, and principles of organizational development**

- a. Operational procedures at the school and division/district level
- b. Principles and issues of school safety and security
- c. Human resources management and development, including adult learning and professional development models
- e. Principles and issues related to school facilities and use of space
- f. Legal issues impacting school operations and management
- g. Technologies that support management functions

**All course topics**

### 4. Efficient Organization

- Operational procedures at the school and district level
- Principles and issues relating to school safety and security
- Human resources management and development
- Principles and issues relating to fiscal operations of school management
- Legal issues impacting school operations
- Current technologies that support management functions

**Course topics 1-11**

### 4.5 Identify and apply appropriate policies, criteria and process for the recruitment, selection, induction, compensation and separation of personnel, with attention to issues of equity and diversity

**Course topics 8-13**

### 5. Knowledge and understanding of the purpose of education and its role in a modern society

- b. Various ethical frameworks and perspectives on ethics
- c. The value of the diverse school community

**Course topics 2, 9-13**

### 5. Acting Fairly and Ethically

- Various ethical frameworks and perspectives on ethics
- The values of the diverse school community
- Professional codes of ethics

**Course topics 2-7, 10, 12-14**

### 8. Financial management and resource allocation

- Identify and analyze the major sources of fiscal and non-fiscal resources for schools and school districts
- Acquire and manage financial and material assets, and capital goods and services, allocating resources according to district or school priorities
<table>
<thead>
<tr>
<th>VADOE STANDARDS</th>
<th>ISLLC STANDARDS</th>
<th>NCATE STANDARDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.3 Develop an efficient budget planning process that is driven by district and school priorities and involves staff and community</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.4 Perform budget management functions including financial planning, monitoring, cost control, expenditures accounting, and cash flow management</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Course topics 1-5, 7-8, 14, 15</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Knowledge and understanding of principles of representative governance that undergird the system of American schools</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. The law as related to education and schooling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. The political, social, cultural, and economic systems and processes that impact schools</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Course topics 1, 7, 9-10</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Understanding and Influencing the Larger Economic and Legal Context</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Principles of representative governance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• The law as related to education and schooling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• The economic systems that impact schools</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Course topics 1, 7, 10, 15</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Technology and information systems</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9.2 apply and assess current technologies for school management and business procedures</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Course topics 3-6, 8</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Education law, public policy and political systems</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11.1 Apply knowledge of federal and state constitutional, statutory and regulatory provisions and judicial decisions governing education</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11.2 Apply knowledge of common law and contractual requirements and procedures in an education setting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11.5 Make decisions based on the moral and ethical implications of policy options and political strategies</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Course topics 1-2, 7, 9-10, 12</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>