

**GEORGE MASON UNIVERSITY
GRADUATE SCHOOL OF EDUCATION
Education Leadership Program**

**EDLE 614
Managing Financial and Human Resources**

Fall 2015, 3 credit hours

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Course Term: 8/31/2015 – 12/12/2015

Course Description

EDLE 614 Managing Financial and Human Resources (3:3:0)

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

Prerequisite(s): EDLE 620, EDLE 690 and EDLE 791.

Course Delivery Method

This course will be delivered online using an **asynchronous** (not “real time”) format via the Blackboard learning management system (LMS) housed in the MyMason portal. You will log in to the Blackboard course site using your Mason email name (everything before @masonlive.gmu.edu) and email password. The course site will be available in 2015. Through reading, case studies, and presentations, candidates will learn how to achieve a deeper understanding of the tasks typically performed by school leaders.

Vision: The Education Leadership Program is dedicated to improving the quality of pre-K – 12 education through teaching, research, and service. Candidates and practicing administrators engage in course work devoted to experiential learning, professional growth opportunities, and doctoral research that informs practice. We educate exceptional leaders who act with integrity as they work to improve schools.

Course Materials

Required Text:

Brimley, Vern, Verstegen, Deborah A., & Garfield, Rulon R. (2016). *Financing Education in a Climate of Change* (12th ed.). Pearson

Course Content

The course provides authentic experiences that help students to achieve a deeper understanding of the tasks typically performed by school leaders. Students are expected to participate actively in hands-on, real world-based activities, applying what they read and learn in class.

Teaching and Learning

Each class will include a variety of activities and exercises. Out-of-class work will rely on readings and on the use of resource task sheets created to complement the primary text. Specific process goals for the class are as follows:

1. Discussion and collaboration are key aspects of this course. All candidates are expected to make multiple, thoughtful contributions to class discussions and assigned projects, based on assigned readings, research, and informed consideration of what classmates have previously said.
2. Writing is an important activity for many roles within schools. Therefore, the process of writing is incorporated so that candidates will achieve the following objectives:
 - a. develop greater confidence in their ability to write effectively using expository, analytical, and persuasive methods;
 - b. learn how to review their own work and the work of others to eliminate errors and maximize clarity; and
 - c. produce written products immune to criticism from a skeptical public.
3. We will endeavor to create an on-line environment that approximates what we know about learning organizations. Consequently, it is important that we create a space that allows participants to try out new ideas and voice opinions without fear of ridicule or embarrassment. The hallmark of a learning organization is a balance between openness and constructive feedback; hence, everyone is expected to:
 - a. demonstrate appropriate **respect for one another**;
 - b. voice concerns and opinions about class process openly;
 - c. engage in **genuine inquiry**;
 - d. recognize and celebrate each other's ideas and accomplishments;
 - e. show an awareness of each other's needs; and
 - f. **maintain strict confidentiality** regarding any information shared.

Course Objectives

This course introduces students to major issues and practices in financial and human resource management as part of the Education Leadership licensure sequence. A substantial emphasis on

simulation and follow-up discussion gives students opportunities to learn and practice skills they will use in their internship experiences and administrative careers. 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.
- 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.
- be able to apply technology to the task of reviewing, analyzing and presenting data.

Candidate Outcomes

Candidates taking this course will:

1. apply major concepts related to financial and human resource allocation and management;
2. use a site allocation to build a budget that supports school mission and goals (required performance);
3. develop a staffing plan that is consistent with site goals and district guidelines (required performance);
4. experience their efforts to mediate disputes;
5. construct a persuasive grant proposal to support school improvement;
6. use technology for learning and administrative purposes; and
7. participate in reflective practice.

Relationship of Course to Internship (EDLE 791)

All students should be making progress on their internship during the semester in which they are enrolled in EDLE 614. Consequently, we will bring up issues related to the internship. Students should be seeking internship opportunities that provide practice with budget allocation, staffing planning, and personnel management.

National Standards and Virginia Competencies

ELCC Standard 1.0: A building-level education leader applies knowledge that promotes the success of every student by collaboratively facilitating the development, articulation, implementation, and stewardship of a shared school vision of learning through the collection and use of data to identify school goals, assess organizational effectiveness, and implement school plans to achieve school goals; promotion of continual and sustainable school improvement; and evaluation of school progress and revision of school plans supported by school-based stakeholders.

- 1.1 Candidates understand and can collaboratively develop, articulate, implement, and steward a shared vision of learning for a school.
- 1.2 Candidates understand and can collect and use data to identify school goals, assess organizational effectiveness, and implement plans to achieve school goals.

ELCC Standard 2.0: A building-level education leader applies knowledge that promotes the success of every student by sustaining a school culture and instructional program conducive to student learning through collaboration, trust, and a personalized learning environment with high expectations for students; creating and evaluating a comprehensive, rigorous and coherent curricular and instructional school program; developing and supervising the instructional and leadership capacity of school staff; and promoting the most effective and appropriate technologies to support teaching and learning within a school environment.

- 2.1 Candidates understand and can sustain a school culture and instructional program conducive to student learning through collaboration, trust, and a personalized learning environment with high expectations for students.

ELCC Standard 3.0: A building-level education leader applies knowledge that promotes the success of every student by ensuring the management of the school organization, operation, and resources through monitoring and evaluating the school management and operational systems; efficiently using human, fiscal, and technological resources in a school environment; promoting and protecting the welfare and safety of school students and staff; developing school capacity for distributed leadership; and ensuring that teacher and organizational time is focused to support high-quality instruction and student learning.

- 3.1 Candidates understand and can monitor and evaluate school management and operational systems.
- 3.2 Candidates understand and can efficiently use human, fiscal, and technological resources to manage school operations.

ELCC Standard 5.0: A building-level education leader applies knowledge that promotes the success of every student by acting with integrity, fairness, and in an ethical manner to ensure a school system of accountability for every student's academic and social success by modeling school principles of self-awareness, reflective practice, transparency, and ethical behavior as related to their roles within the school; safeguarding the values of democracy, equity, and diversity within the school; evaluating the potential moral and legal consequences of decision making in the school; and promoting social justice within the school to ensure that individual student needs inform all aspects of schooling.

- 5.1 Candidates understand and can act with integrity and fairness to ensure a school system of accountability for every student's academic and social success.
- 5.5 Candidates understand and can promote social justice within the school to ensure that individual student needs inform all aspects of schooling.

Standard 6.0: A building-level education leader applies knowledge that promotes the success of every student by understanding, responding to, and influencing the larger political, social, economic, legal, and cultural context through advocating for school students, families, and caregivers; acting to influence local, district, state, and national decisions affecting student learning in a school environment; and anticipating and

assessing emerging trends and initiatives in order to adapt school- based leadership strategies.

- 6.3 Candidates understand and can anticipate and assess emerging trends and initiatives in order to adapt school-based leadership strategies.

This course addresses the following VDOE Competencies:

- 1.b. Knowledge, understanding and application of systems and organizations, including
- (7) Effective communication skills including consensus building, negotiation, and mediation skills.
- 1.c. Knowledge understanding and application of management and leadership skills that achieve effective and efficient organizational operations, including
- (3) Management decisions that ensure successful teaching and learning including, human resources management and development, theories of motivation, change in school culture, innovation and creativity, conflict resolution, adult learning and professional development models;
- (4) Principles and issues related to fiscal operations of school management; and
- (7) Technologies that support management functions.

Technology Requirements

This course will be delivered on GMU's Blackboard platform, so students are required to have access to Blackboard. A Blackboard site is available to all students enrolled in the course at: <http://mymason.gmu.edu>. You need to log on using your GMU user name and password. To participate in this course, students will need the following resources:

- High-speed Internet access with a standard up-to-date browser, either Internet Explorer or Mozilla Firefox. Opera and Safari are not compatible with Blackboard;
- Consistent and reliable access to their GMU email and Blackboard, as these are the official methods of communication for this course.
- Students may be asked to create logins and passwords on supplemental websites and/or to download trial software to their computer or tablet as part of the course requirements.
- The following software plug-ins for PCs and Macs respectively, available for free downloading by clicking on the link next to each plug-in:
 - **Adobe Acrobat Reader:** <http://get.adobe.com/reader/>
 - **Windows Media Player:** <http://windows.microsoft.com/en-us/windows/download-windows-media-player>
 - **Apple QuickTime Player:** www.apple.com/quicktime/download/
- A headset microphone for use with the Blackboard Collaborate web conferencing tool Blackboard

Other Technology Reminders

Bb Collaborate: You will communicate with your colleagues and instructor using Bb Collaborate for both group collaborate sessions and the instructor's virtual office hours. We may also use **Skype and Google Hangout** as possible video communication platforms when needed.

Email: All candidates are required to activate and monitor their GMU e-mail accounts. I strongly recommend that you do not forward your Mason e-mail to a different account because

attachments are often lost that way. It is best to check e-mail directly from your Mason account daily. Per university policy in compliance with federal law, I will only communicate with candidates via their GMU email accounts and will be unable to respond to emails sent from other accounts (i.e., gmail, yahoo, work email, etc.). Any announcements regarding the course will be sent to your GMU account. I will respond to emails within 24 hours, excluding weekends.

Course Requirements

General Expectations

Consistent with expectations of a Master's level course in the Education Leadership program, grading is based heavily on student performance on written assignments and project based learning activities. The assignments constructed for this course reflect a mix of skills associated with the application of school budget and staffing practices as it pertains to the national, state, and local practices. Overall, written work will be assessed using the following broad criteria:

1. Application of concepts embedded in assigned readings and other materials and reinforced in classroom activities.
2. The quality of analysis, synthesis, and application.
3. The ability to write in a clear, concise, and organized fashion.

Additionally, a significant portion of the class grade will be based on participation in various individual and group activities. The overall weights of the various performances are as follows:

Evaluation Criteria: Performance-Based Assessment

Students can earn a total **500 points** in this course. Here is a quick overview of the breakdown of possible points through assignments (65%), participation (24%), and reflection journal (11%).

Assignments (325 points)

The four graded assignments required for this course are as follows:

The Budget Interview (60 points)

The Budget Allocation Proposal (100 points)

The Staffing Allocation Proposal (100 points)

The Grant Proposal (65 points)

Assignment descriptions and rubrics are available on the course site and at the end of the syllabus.

Every student registered for any EDLE course with a required performance-based assessment (Budget Allocation and Staffing Allocation) is required to submit this assessment to Blackboard (regardless of whether a course is an elective, a onetime course or part of an undergraduate minor.) Evaluation of your performance-based assessment will also be provided using Blackboard. Failure to submit the assessment to Blackboard will result in the course instructor reporting the course grade as Incomplete (IN). Unless this grade is changed upon completion of the required Blackboard submission, the IN will convert to an F nine weeks into the following semester.

Participation Requirements (120 points)

To maximize learning and engagement in the online environment, students are expected to participate actively in class discussions, group activities, and serve as critical friends to other students. In this course, participation points are given by unit, rather than per learning activity. The participation rubric and related activities can be found on our course site and in the syllabus.

Below is a list of all required learning activities, by unit, which will count toward your overall participation grade.

Orientation (10 points)

- Syllabus Quiz
- Introductory Journal

Unit 1 (50 points)

- Individual and Group Exercises
- Class discussion

Unit 2 (30 points)

- Individual and Group Exercises
- Class discussion

Unit 3 (30 points)

- Individual and Group Exercises
- Class discussion

Reflection Journal (55 points)

All students will be required to write a reflection at the end of every lesson to address the following elements: 1) lessons learned and 2) application to real world in current and future roles.

Each assignment relates to the application of finance and human resources. A description of each assignment and a rubric for grading each assignment are included at the end of this syllabus.

Submission of Work: All assignments must be submitted **on time, electronically via Blackboard.**

Late work: Candidates' work is expected on time, meaning no later than by midnight of the due date. Late assignments will not be accepted except in emergency situations that have been discussed and approved by the instructor in advance of the due date. Please take advantage of instructor office hours and availability to get assistance prior to assignment deadlines.

Grading Scale:

A+	=	500 points
A	=	475 - 499
A-	=	450 - 474
B+	=	435 - 449

B	=	415 - 434
B-	=	400 - 414
C	=	375 - 399
F	=	Below 375 points

On-line Expectations

- **Course Week:** Because online courses do not have a “fixed” meeting day, our week will **start** on Monday and **finish** on Sunday.
- **Log-in Frequency:** Students must actively check the course Blackboard site and their GMU email for communications from the instructor, at a minimum this should be done 2 times per week.
- **Participation:** Students are expected to actively engage in all course activities throughout the semester, which include viewing of all course materials, completing course activities and assignments, and participating in course discussions and group interactions.
- **Technical Competence:** Students are expected to demonstrate competence in the use of all course technology. Students are expected to seek assistance if they are struggling with technical components of the course.
- **Technical Issues:** Students should expect that they could experience some technical difficulties at some point in the semester and should, therefore, budget their time accordingly. Late work will not be accepted based on individual technical issues.
- **Workload:** Expect to log in to this course **daily** to read announcements, participate in the discussions, and work on course materials. Remember, this course is **not** self-paced. There are **specific deadlines** and **due dates** listed in the **CLASS SCHEDULE** section of this syllabus to which you are expected to adhere. It is the student’s responsibility to keep track of the weekly course schedule of topics, readings, activities and assignments due.
- **Advising:** If you would like to schedule a one-on-one meeting to discuss course requirements, content or other course-related issues, and you are unable to come to the Mason campus, we can meet via telephone or web conference. Send me an email to schedule your one-on-one session and include your preferred meeting method and suggested dates/times.
- **Netiquette:** Our goal is to be **collaborative**, not combative. Experience shows that even an innocent remark in the online environment can be misconstrued. I suggest that you always re-read your responses carefully before you post. **Be positive in your approach to others and diplomatic with your words.** I will do the same. Remember, you are not competing with each other but sharing information and learning from one another as well as from the instructor.

George Mason University Policies and Resources for Students

- Students must adhere to the guidelines of the George Mason University Honor Code at <http://oai.gmu.edu/the-mason-honor-code-2/>
- Students must follow the university policy for Responsible Use of Computing [See <http://universitypolicy.gmu.edu/policies/responsible-use-of-computing/>]

- ***Student Responsibilities:*** Students are responsible for the content of university communications sent to their George Mason University email account and are required to activate their account and check it regularly. All communication from the university, college, school, and program will be sent to students solely through their Mason email account.
- The George Mason University Counseling and Psychological Services (CAPS) staff consists of professional counseling and clinical psychologists, social workers, and counselors who offer a wide range of services (e.g., individual and group counseling, workshops and outreach programs) to enhance students' personal experience and academic performance [See <http://caps.gmu.edu/>].
- Students with disabilities who seek accommodations in a course must be registered with the George Mason University Office of Disability Services (ODS) and inform their instructor, in writing, at the beginning of the semester [See <http://ods.gmu.edu/>].
- The George Mason University Writing Center staff provides a variety of resources and services (e.g., tutoring, workshops, writing guides, handbooks) intended to support students as they work to construct and share knowledge through writing [See <http://writingcenter.gmu.edu/>].
- ***Plagiarism Statement:*** Statement of English Department at George Mason University
Plagiarism means using the exact words, opinions, or factual information from another person without giving that person credit. Writers give credit through accepted documentation styles, such as parenthetical citation, footnotes, or endnotes; a simple listing of books and articles is not sufficient. Plagiarism is the equivalent of intellectual robbery and cannot be tolerated in an academic setting. Student writers are often confused as to what should be cited. Some think that only direct quotations need to be credited. While direct quotations do need citations, so do paraphrases and summaries of opinions or factual information formerly unknown to the writers or which the writers did not discover themselves. Exceptions for this include factual information which can be obtained from a variety of sources, the writers' own insights or findings from their own field research, and what has been termed common knowledge. What constitutes common knowledge can sometimes be precarious; what is common knowledge for one audience may not be so for another. In such situations, it is helpful, to keep the reader in mind and to think of citations as being "reader friendly." In other words, writers provide a citation for any piece of information that they think their readers might want to investigate further. Not only is this attitude considerate of readers, it will almost certainly ensure that writers will never be guilty of plagiarism. (Statement of English Department at George Mason University)George Mason University operates under an honor system, which is published in the University Catalog and deals specifically with cheating, attempted cheating, plagiarism, lying, and stealing. Please familiarize yourself with the honor code, especially the statement on plagiarism (<http://www.gmu.edu/facstaff/handbook/aD.html>). If you have questions about when the contributions of others to your work must be acknowledged and appropriate ways to cite those contributions, please talk with the professor or utilize the GMU writing center.
- ***Plagiarism and the Internet:*** Copyright rules also apply to users of the Internet who cite from Internet sources. Information and graphics accessed electronically must also be cited, giving credit to the sources. This material includes but is not limited to e-mail (don't cite or forward someone else's e-mail without permission), newsgroup material, information from Web sites, including graphics. Even if you give credit, you must get permission from the original source to put any graphic that you did not create on your

web page. Shareware graphics are not free. Freeware clipart is available for you to freely use. If the material does not say "free," assume it is not. Putting someone else's Internet material on your web page is stealing intellectual property. Making links to a site is, at this time, okay, but getting permission is strongly advised, since many Web sites have their own requirements for linking to their material.

- **Academic Integrity & Inclusivity:** This course embodies the perspective that we all have differing perspectives and ideas and we each deserve the opportunity to share our thoughts. Therefore, we will conduct our discussions with respect for those differences. That means, we each have the freedom to express our ideas, but we should also do so keeping in mind that our colleagues deserve to hear differing thoughts in a respectful manner, i.e. we may disagree without being disagreeable. <http://oai.gmu.edu/>
- **Diversity, Religious Holiday:** Please refer to George Mason University's calendar of religious holidays and observations (<http://ulife.gmu.edu/calendar/religious-holiday-calendar/>). It is the student's responsibility to speak to the instructor in advance should their religious observances impact their participation in class activities and assignments.
- **Student Privacy Policy:** George Mason University strives to fully comply with FERPA by protecting the privacy of student records and judiciously evaluating requests for release of information from those records. Please see George Mason University's student privacy policy <https://registrar.gmu.edu/students/privacy/>
- **Professional Dispositions:** Students are expected to exhibit professional behaviors and dispositions at all times.
- **Students with Disabilities:** All students with questions or concerns about this class are encouraged to set up a time to meet with the professor, preferably during the first week of the semester. Students with disabilities should work with the Disabilities Resource Center (DRC) to identify appropriate accommodations and communicate those with the professor.

Core Values Commitment

The College of Education and Human Development is committed to collaboration, ethical leadership, innovation, research-based practice, and social justice. Students are expected to adhere to these principles.

Proposed class schedule:

To accommodate the learning needs of the class, the topics and reading schedule may be amended during the semester. Any changes will be communicated via email or Blackboard.

PLEASE NOTE: Reflection journal will also be due at the same time as the due date of the tasks below.

Starting Date	TOPICS	TASKS
8-31-15	<ul style="list-style-type: none">• Course Overview• Navigating the course online	Syllabus Quiz and Warm-up Activity under Course Orientation & Overview (Due: 9/6/15)
9-07-15	<ul style="list-style-type: none">• The Historical Perspectives of School Budget (Lesson 1)	Reading: Chapters 1 & 2 Lesson 1 – Test Your Understanding and Individual Exercise (Due: 9/13/15)
9-14-15	<ul style="list-style-type: none">• Sources for school funding (Lesson 2)	Chapter 3 Lesson 2 – Test Your Understanding (Due: 9/20/15)
9-21-15	<ul style="list-style-type: none">• Sources for school funding (Lesson 2 - continued)	Chapter 4 Lesson 2 – Individual Exercise (Due: 9/27/15)
9-28-15	<ul style="list-style-type: none">• Generating Funds (Lesson 3)	Chapter 5 Lesson 3 – Test Your Understanding & Group Exercise & Class Discussion (Due: 10/4/15)
10-05-15	<ul style="list-style-type: none">• Generating Funds (Lesson 3 – continued)	Chapter 6 Lesson 3 – Individual Exercise (Due: 10/11/15)
10-12-15	<ul style="list-style-type: none">• School Funding and Budget (Lesson 4)	Chapters 7, 8, 9, & 10 Lesson 4 – Test Your Understanding, Group Exercise and Individual Exercise (Due: 10/18/15)
10-19-15	<ul style="list-style-type: none">• Fiscal Accountability (Lesson 5)	Chapters 12 & 13 Lesson 5 – Test Your Understanding and Individual

		Exercise (Due: 10/25/15) Budget Interview Assignment (Due: 10/25/15)
10-26-15	<ul style="list-style-type: none"> Facilities and School Community (Lesson 6) 	Chapter 11 Lesson 6 – Test Your Understanding and Individual Exercise (Due: 11/1/15)
11-02-15	<ul style="list-style-type: none"> Staffing and Fiscal Accountability (Lesson 7) 	Chapter 14 Lesson 7 – Test Your Understanding and Individual Exercise (Due: 11/8/15)
11-09-15	<ul style="list-style-type: none"> Financial and Staffing Issues in Schools (Lesson 8) 	Chapter 15 Lesson 8 – Individual Exercise (Due: 11/15/15)
11-16-15	<ul style="list-style-type: none"> Introduction to Interviewing (Lesson 9) 	Chapter 16 Lesson 9 – Test Your Understanding and Individual Exercise (Due: 11/22/15) Budget Allocation Assignment (Due: 11/22/15)
11-23-15	<ul style="list-style-type: none"> Thanksgiving Break 	
11-30-15	<ul style="list-style-type: none"> Supervision and Evaluation (Lesson 10) 	Reading – Articles Lesson 10 – Individual Exercise (Due: 12/6/15) Staffing Allocation Assignment (Due: 12/6/15)
12-07-15	<ul style="list-style-type: none"> Personnel and Legal Issues (Lesson 11) 	Reading – Articles Lesson 11 – Individual Exercise (Due: 12/12/15) Grant Proposal Assignment (Due: 12/12/15)

**WRITING ASSIGNMENT —
THE BUDGET ALLOCATION PROPOSAL
(Required Performance)
100 Points**

Rationale

Budget allocations must be prepared in a fashion that is both comprehensive and clearly understood by school personnel, central office administrators, and parents. The primary goal of this assignment is to help students learn how to take a site budget dollar amount; allocate it among needs at the school site consistent with the school's vision, mission, and goals; and present the allocation in a brief verbal statement, in detail using numbers. An additional important goal is to learn how to present and discuss a budget with others who need to be persuaded as to the budget's merits.

All students will work with a school level of their choosing, an elementary, middle, or a high school budget in order to experience concerns at that level. It is recommended that students work with a level outside of their comfort area to diversify their experiences.

Product

Each student will submit a budget allocation proposal based on the selected level. Budget allocations are to be made based on the unique needs of each school. Budgets must be consistent with an explicitly stated vision, mission, and/or goals and should be used to address achievement deficiencies anticipated based on the given scenarios.

Each student is required to submit four written pieces for this assignment:

1. For each school, a brief, verbal overview of the budget that includes
 - a statement of vision, mission, and/or goals that guide the budget making process;
 - a description of how the budget was developed and who will be responsible for what during its implementation;
 - a clear rationale for the allocation of funds; and
 - an explanation of why the budget makes sense in the more general budget context.The paper must be written in an acceptable format.
2. For each school, a spreadsheet that shows the dollar amount allocated to each relevant budget category and the fact that the budget balances.

Budget Allocation Assessment Rubric

	Exceeds Expectations 4	Meets Expectations 3	Approaching Expectations 2	Falls Below Expectations 1
ELCC 1.1 Candidates demonstrate the ability to develop, articulate, and steward a vision (10%)	The proposal specifies the participatory role of school stakeholders in helping to achieve the school vision through their active development and implementation of the budget.	The proposal explains how the budget was developed so that stakeholders will understand its rationale.	The proposal is vague with respect to rationale and/or stakeholder participation.	The proposal is silent on the issues of rationale and stakeholder participation.
ELCC 3.2 Candidates demonstrate the ability to use of human, fiscal, and technological resources efficiently (15%)	The proposal communicates a clear, persuasive, and comprehensive explanation for why this particular allocation of resources has a high probability of improving student achievement.	The proposal communicates a clear explanation for why this resource allocation will help improve student achievement.	The explanation in the proposal is not entirely clear and the connection to student achievement is ambiguous.	No connection between the budget and student achievement is in evidence.
ELCC 3.1 Candidates demonstrate the ability to monitor and evaluate school management and operational systems (15%)	The proposal provides a persuasive plan of action for efficient and effective allocation of resources focused on school improvement.	The proposal provides a clear plan of action for efficient and effective allocation of resources focused on school improvement.	The proposal leaves open questions of effectiveness and/or efficiency, but intent is communicated.	The proposal does not communicate how criteria of efficiency and effectiveness are met.
ELCC 6.3 Candidates demonstrate the ability to understand, anticipate, and assess emerging trends (10%)	The proposal provides clear and persuasive analysis of emerging trends and how they are addressed in the budget.	The proposal provides some discussion about how the budget addresses emerging trends.	The proposal mentions one or two contextual factors, but does not correlate them with the development of the budget.	The proposal fails to mention anything about how the budget addresses emerging trends.
ELCC 1.2 Candidates demonstrate the ability to understand, collect, and use data to identify and assess organizational effectiveness (10%)	The proposal clearly and persuasively demonstrates how the budget will help the school to achieve its strategic and tactical goals.	The proposal presents a budget that logically follows from the school's strategic and tactical goals.	It is unclear how the budget presented in the proposal supports the school's strategic and tactical goals.	There are no apparent connections between the school's strategic and tactical goals and the budget presented in the proposal.

ELCC 5.1 Candidates demonstrate the ability to act with integrity and fairness to ensure students' success (15%)	The proposal demonstrates equitable decision making that is clearly consistent with students' priority needs.	The proposal demonstrates equitable decision making, however selected allocations appear inconsistent with students' priority needs.	The proposal demonstrates limited evidence of equity in decision making and/or the allocations are inconsistent with students' priority needs.	The proposal is confusing and/or is not consistent with the cover memo.
ELCC 5.5 Candidates demonstrate the ability to understand and promote social justice (15%) .	The proposal clearly and persuasively demonstrates how resources are allocated to special needs students in a manner that addresses their particular teaching and learning challenges within district guidelines and legal boundaries.	The proposal acknowledges the importance of addressing the special needs of specific student populations, but may not be entirely persuasive with respect to adequacy.	Special needs students are represented in the proposal, but resource allocation appears inadequate. There may also be some indication of violation of district procedures and/or legal boundaries.	Special needs students are not represented in the proposal or are inadequately addressed.
Mechanics and Accuracy (10%) Students use standard English and avoid grammar and punctuation errors. All data is accurately and consistently presented.	The assignment is <u>free</u> of errors—both verbal and numerical.	The assignment has a few errors.	The assignment has some errors.	The assignment has numerous errors.

**WRITING ASSIGNMENT—
THE STAFFING ALLOCATION
(Required Performance)
100 Points**

Rationale

This assignment is very similar in format and requirements to the budget allocation assignment. The reason for this is that the needs are essentially the same—to present somewhat complicated data in a fashion that others can easily grasp.

Staffing allocations must be prepared in a fashion that is both comprehensive and clearly understood by various constituencies. The primary goal of this assignment is to help students learn how to take a site staffing allotment; allocate it among needs at the school site consistent with the school's vision, mission, and goals; and present the school staffing in a brief verbal statement, in detail, using numbers. An additional important goal is to learn how to present and discuss a staffing allocation with others who need to be persuaded as to its merits.

All students will work to create an elementary, middle, or a high school staffing allocation in order to experience concerns at that level. It is recommended for students to select a level different from their comfort area.

Product

Each student will submit a staffing allocation with an overview of the demographic of the school. Staffing allocations are to be made based on the unique needs of each school. Staffing must be consistent with an explicitly stated vision, mission, and/or goals and should be used to address achievement deficiencies anticipated based on the given scenarios.

Each student is required to submit four written pieces for this assignment:

1. For each school, a brief, verbal overview of the staffing allocation in a paper that includes
 - a statement of vision, mission, and/or goals that guide the staffing allocation process;
 - a description of how the staffing was developed and who will be responsible for what during its implementation;
 - a clear rationale for the allocation of staff; and
 - an explanation of why the staffing makes sense in the more general budget/resources context.

The paper must be written in an acceptable format.

2. For each school, a spreadsheet that shows a detailed staffing allocation and the fact that the allocation does not exceed the district allotment.

Staffing Allocation Assessment Rubric

	Exceeds Expectations 4	Meets Expectations 3	Approaching Expectations 2	Falls Below Expectations 1
ELCC 1.1 Candidates demonstrate the ability to develop, articulate, and steward a vision (10%)	The proposal specifies the participatory role of school stakeholders in helping to achieve the school vision through their active development and implementation of the staffing allocation.	The proposal explains how the staffing allocation was developed so that stakeholders will understand its rationale.	The proposal is vague with respect to rationale and/or stakeholder participation.	The proposal is silent on the issues of rationale and stakeholder participation.
ELCC 2.1 Candidates demonstrate the ability to collaborate, build trust and a personalized learning environment with high expectations (10%)	The proposal communicates a clear, persuasive, and comprehensive explanation for why this particular staffing allocation has a high probability of improving student achievement.	The proposal communicates a clear explanation for why this staffing allocation will help improve student achievement.	The explanation in the proposal is not entirely clear and the connection to student achievement is ambiguous.	No connection between the staffing allocation and student achievement is evident.
ELCC 6.3 Candidates demonstrate the ability to understand, anticipate, and assess emerging trends (10%)	The proposal provides clear and persuasive analysis of emerging trends and how they are addressed in the staffing allocation.	The proposal provides some discussion about how the staffing allocation addresses emerging trends.	The proposal mentions one or two contextual factors, but does not correlate them with the development of the staffing allocation.	The proposal fails to mention anything about how the staffing allocation addresses emerging trends.
ELCC 3.1 Candidates demonstrate the ability to monitor and evaluate school management and operational systems (15%)	The proposal provides clear and compelling evidence of the candidate's ability to monitor and evaluate school management and operations	The proposal provides some evidence of the candidate's ability to monitor and evaluate school management and operations	The proposal is vague or unclear about the candidate's ability to monitor and evaluate school management and operations	The proposal does not contain evidence of the candidate's ability to monitor and evaluate school management and operations
ELCC 3.2 Candidates demonstrate an understanding and can use human, fiscal, and technological resources efficiently to manage school operations (15%)	The spreadsheet persuasively supports the cover memo and demonstrates creative and effective use of the district allocation of human resources.	The spreadsheet is consistent with the cover memo and shows that all district-allocated human resources are put to good use.	The spreadsheet has some positive features, but it either does not fully utilize the district staffing allotment and/or it contains questionable staffing choices.	The proposal does not adequately allocate district-allotted human resources.
ELCC 5.1 Candidates demonstrate the ability to act with integrity and fairness to ensure students' success (15%)	The proposal demonstrates equitable decision making that is clearly consistent with students' priority needs.	The proposal demonstrates equitable decision making, however selected allocations appear inconsistent with students' priority needs.	The proposal demonstrates limited evidence of equity in decision making and/or the allocations are inconsistent with students' priority needs.	The proposal is confusing and/or is not consistent with the cover memo.

<p>ELCC 5.5 Candidates demonstrate the ability to promote social justice (15%)</p>	<p>The proposal clearly and persuasively demonstrates how staffing is allocated to special needs students in a manner that addresses their particular teaching and learning challenges within district guidelines and legal boundaries.</p>	<p>The proposal acknowledges the importance of addressing the special needs of specific student populations, but may not be entirely persuasive with respect to adequacy.</p>	<p>Special needs students are represented in the proposal, but staffing allocation appears inadequate. There may also be some indication of violation of district procedures and/or legal boundaries.</p>	<p>Special needs students are not represented in the proposal or are inadequately addressed.</p>
<p>Mechanics and Accuracy (10%)</p> <p>Students use standard English and avoid grammar and punctuation errors. All data is accurately and consistently presented.</p>	<p>The assignment is free of errors—both verbal and numerical.</p>	<p>The assignment has a few errors.</p>	<p>The assignment has some errors.</p>	<p>The assignment has numerous errors.</p>

ASSIGNMENT
GRANT PROPOSAL
65 points

Rationale

Funds are usually tight in schools and districts, making it very difficult to initiate new and innovative programs. Consequently, grant money is often the only way to reach a particular population of students in a new way. Learning how to write a grant is a vital skill for a future education leader. The ideal way to approach this assignment is to pursue a grant that will support the School Improvement Project proposal you created in EDLE 690.

Product

1. Identify the financial needs of your SIP that cannot or will not be met through your school or district and target your grant toward meeting these needs. Alternatively, work with your principal or supervisor to identify an area of need that could be addressed through the procurement of additional funds.
2. Once you have identified a need at your site, you will explore several different sources of grant money to find one that is most appropriate to the need you have identified.
3. Following the guidelines of the grant you wish to receive, you will write a proposal that presents the need, your plan for how to meet the need, expected outcomes, how you will evaluate the success of your project, and a budget for the grant.
4. Grant proposals must be for not less than \$250 and should probably not exceed \$20,000.

Grant Proposal Assessment Rubric

	Exceeds Expectations 4	Meets Expectations 3	Approaching Expectations 2	Falls Below Expectations 1
<u>Statement of Need (20%)</u> The need for the grant money must be obvious for a funding agency to be interested in providing it to your school or district.	The need is very persuasively stated and directly tied to teaching and learning.	The need is logically presented, but may not be as persuasive as it could be.	The need is apparent, but not as clearly or persuasively presented as it might be. Critical information might be missing.	The need for the grant is unclear.
<u>Plan to Meet the Need (20%)</u> For a plan to gain the confidence of a funding agency, it must be clearly and directly tied to the specific need you have identified.	The plan addresses the need in detail, demonstrating numerous links that show each aspect of the need will be met through the plan.	The plan is logically and tightly linked to the identified need.	The plan seems attractive but may have some areas that do not seem to be tied to need as you have identified it.	The plan is unclear and/or not directly linked to the need as you have articulated it.
<u>Expected Outcomes (20%)</u> The funding agency wants a clear picture of how the grant will help your site.	The expected outcomes are persuasively stated so that any person observing the grant in action would recognize them. Expected teaching and learning results are clear.	The expected outcomes are clearly presented and logically linked to the plan.	Expected outcomes are stated, but they are not as clear as they could be, or they seem unrelated to the plan and/or the need.	Expected outcomes are unclear or missing.
<u>Evaluation of the Project (15%)</u> The funding agency usually wants to know how you will know if the money was well spent.	The evaluation plan persuasively addresses all components of the plan to meet the need. Clear criteria and standards are established.	The evaluation plan addresses the plan to meet the need. Criteria and standards may not be entirely clear and/or logical.	The evaluation plan is not clearly connected to other aspects of the grant and/or lacks clear criteria and standards.	The evaluation plan is missing or difficult to understand. Criteria and/or standards may be missing.
<u>Budget (15%)</u> All grants require a budget so that the funding agency has a clear picture of how granted money will be spent.	The budget meets the criteria contained in the budget allocation assessment rubric. It supports all aspects of the plan to meet the need.	The budget is clear and well presented.	The budget is somewhat confusing.	The budget is missing or incomplete.
<u>Grammar & Mechanics (10%)</u> Any writing submitted for public review should be free of errors.	The grant proposal is free of errors.	The grant proposal contains a few errors.	The grant proposal contains some errors.	The grant proposal contains numerous errors.

