

**George Mason University  
College of Education and Human Development  
Education Leadership Program**

**EDLE 614, Section DL1 – Managing Financial and Human Resources  
3 Credits, Fall 2020**

**Faculty**

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**Prerequisites/Corequisites**

EDLE 620, EDLE 690, and EDLE 791.

**University Catalog Course Description**

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.

**Course Overview**

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.

**Course Delivery Method**

This course will be delivered online (100%) using an asynchronous (not “real time”) format via Blackboard Learning Management system (LMS) housed in the MyMason portal. You will log in to the Blackboard (Bb) course site using your Mason email name (everything before @masonlive.gmu.edu) and email password. The course site will be available on Monday, August 24, 2020.

**Under no circumstances, may candidates/students participate in online class sessions (either by phone or Internet) while operating motor vehicles. Further, as expected in a face-to-face class meeting, such online participation requires undivided attention to course content and communication.**

## Technical Requirements

To participate in this course, students will need to satisfy the following technical requirements:

- High-speed Internet access with a standard up-to-date browser, either Internet Explorer or Mozilla Firefox is required (note: Opera and Safari are not compatible with Blackboard).
- Students must maintain 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 course requirements.
- The following software plug-ins for PCs and Macs, respectively, are available for free download:
  - Adobe Acrobat Reader: <https://get.adobe.com/reader/>
  - Windows Media Player:  
<https://support.microsoft.com/en-us/help/14209/get-windows-media-player>
  - Apple Quick Time Player: [www.apple.com/quicktime/download/](http://www.apple.com/quicktime/download/)

## Expectations

- Course Week:  
**Because asynchronous courses do not have a “fixed” meeting day, our week will start on Wednesday, and finish on Tuesday at 11:59 pm.**  
Our course week will begin on the day that our synchronous meetings take place as indicated on the Schedule of Classes, August 27, 2018.
- Log-in Frequency:  
Students must actively check the course Blackboard site and their GMU email for communications from the instructor, class discussions, and/or access to course materials at least 3 times per week. In addition, students must log-in for all scheduled online synchronous meetings.
- Participation:  
Students are expected to actively engage in all course activities throughout the semester, which includes viewing 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 who are struggling with technical components of the course are expected to seek assistance from the instructor and/or College or University technical services.
- Technical Issues:  
Students should anticipate some technical difficulties during the semester and should, therefore, budget their time accordingly. Late work will not be accepted based on individual technical issues.
- Workload:  
Please be aware that this course is **not** self-paced. Students are expected to meet *specific deadlines* and *due dates* listed in the **Class Schedule** section of this syllabus. It is the

student's responsibility to keep track of the weekly course schedule of topics, readings, activities and assignments due.

- Instructor Support:

Students may schedule a one-on-one meeting to discuss course requirements, content or other course-related issues. Those unable to come to a Mason campus can meet with the instructor via telephone or web conference. Students should email the instructor to schedule a one-on-one session, including their preferred meeting method and suggested dates/times.

- Netiquette:

The course environment is a collaborative space. Experience shows that even an innocent remark typed in the online environment can be misconstrued. Students must always re-read their responses carefully before posting them, so as others do not consider them as personal offenses. *Be positive in your approach with others and diplomatic in selecting your words.* Remember that you are not competing with classmates, but sharing information and learning from others. All faculty are similarly expected to be respectful in all communications.

- Accommodations:

Online learners who require effective accommodations to insure accessibility must be registered with George Mason University Disability Services.

## **Learner Outcomes or Objectives**

This course is designed to enable students to do the following:

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. evaluate the effectiveness of simulated teacher interviews that are consistent with legal guidelines;
5. experience their efforts to mediate disputes;
6. construct a persuasive grant proposal to support school improvement;
7. use technology for learning and administrative purposes; and
8. participate in reflective practice.

## **Professional Standards (National Standards and Virginia Competencies)**

Upon completion of this course, students will have met the following professional standards:

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.

### **National Educational Leadership Preparation (NELP) Standards:**

NELP Building-Level Standard 1: Mission, Vision, and Improvement: to collaboratively lead, design, and implement a school mission, vision, and process for continuous improvement that reflects a core set of values and priorities that include data, technology, equity, diversity, digital citizenship, and community.

Component 1.1: Program completers understand and demonstrate the capacity to collaboratively evaluate, develop, and communicate a school mission and vision designed to reflect a core set of values and priorities that include data use, technology, equity, diversity, digital citizenship, and community.

NELP Building-Level Standard 2: Ethics and Professional Norms: to understand and demonstrate the capacity to advocate for ethical decisions and cultivate and enact professional norms.

Component 2.1: Program completers understand and demonstrate the capacity to reflect on, communicate about, cultivate, and model dispositions and professional norms (e.g., equity, fairness, integrity, transparency, trust, digital citizenship, collaboration, perseverance, reflection, lifelong learning, digital citizenship) that support the educational success and well-being of each student and adult.

NELP Building-Level Standard 3: Equity, Inclusiveness, and Cultural Responsiveness: to develop and maintain a supportive, equitable, culturally responsive, and inclusive school culture.

Component 3.1: Program completers understand and demonstrate the capacity to use data to evaluate, design, cultivate, and advocate for a supportive and inclusive school culture.

NELP Building-Level Standard 4: Learning and Instruction: to evaluate, develop, and implement coherent systems of curriculum, instruction, data systems, supports, and assessment.

Component 4.1: Program completers understand and can demonstrate the capacity to evaluate, develop, and implement high-quality, technology- rich curricula, programs, and other supports for academic and non- academic student programs.

Component 4.4: Program completers understand and demonstrate the capacity to collaboratively evaluate, develop, and implement the school's curriculum, instruction, technology, data systems, and assessment practices in a coherent, equitable, and systematic manner.

NELP Building-Level Standard 5: Community and External Leadership: to engage families, community, and school personnel in order to strengthen student learning, support school improvement, and advocate for the needs of their school and community.

Component 5.3: Program completers understand and demonstrate the capacity to communicate through oral, written, and digital means with the larger organizational, community, and political contexts when advocating for the needs of their school and community.

NELP Building-Level Standard 6: Operations and Management: to improve management, communication, technology, school-level governance, and operation systems; to develop and improve data-informed and equitable school resource plans; and to apply laws, policies, and regulations.

Component 6.1: Program completers understand and demonstrate the capacity to evaluate, develop, and implement management, communication, technology, school-level governance, and operation systems that support each student's learning needs and promote the mission and vision of the school.

Component 6.2: Program completers understand and demonstrate the capacity to evaluate, develop, and advocate for a data-informed and equitable resourcing plan that supports school improvement and student development.

NELP Building-Level Standard 7: Building Professional Capacity: to build the school's professional capacity, engage staff in the development of a collaborative professional culture, and improve systems of staff supervision, evaluation, support, and professional learning.

Component 7.1: Program completers understand and have the capacity to collaboratively develop the school's professional capacity through engagement in recruiting, selecting, and hiring staff.

## **Suggested Texts**

Schilling, Craig A. & Tomal, Daniel R. (2013). *Resource Management for School Administrators*. Lanham, Maryland: Rowman & Littlefield Education.

## Course Performance Evaluation

Students are expected to submit all assignments on time in the manner outlined by the instructor (e.g., Blackboard, Tk20, hard copy).

**Submission of Work:** All assignments must be submitted on time, meaning no later than by midnight of the due date, electronically via Blackboard and/or Tk20. 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.

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:

- **Assignments and/or Examinations**

Students can earn a total **500 points** in this course. Here is a quick overview of the breakdown of possible points through assignments (60%), participation and reflection (40%).

**Assignments (300 points)**

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

**The Budget Interview (50 points)**

**The Budget Allocation Proposal (100 points)**

**The Staffing Allocation Proposal (100 points)**

**The Grant Proposal (50 points)**

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

- **Other Requirements**

**Participation and Reflection Requirements (200 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 (5 points)**

- Introductory Journal

**Unit 1 (75 points)**

- Individual and Group Exercises
- Class discussion and Reflection

**Unit 2 (75 points)**

- Individual and Group Exercises
- Class discussion and Reflection

**Unit 3 (45 points)**

- Individual and Group Exercises
- Class discussion and Reflection

• **Grading**

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

**Professional Dispositions**

See <https://cehd.gmu.edu/students/policies-procedures/>

**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: <http://cehd.gmu.edu/values/>.

## **GMU Policies and Resources for Students**

### *Policies*

- Students must adhere to the guidelines of the Mason Honor Code (see <https://catalog.gmu.edu/policies/honor-code-system/> ).
- Students must follow the university policy for Responsible Use of Computing (see <http://universitypolicy.gmu.edu/policies/responsible-use-of-computing/>).
- Students are responsible for the content of university communications sent to their Mason 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.
- Students with disabilities who seek accommodations in a course must be registered with George Mason University Disability Services. Approved accommodations will begin at the time the written letter from Disability Services is received by the instructor (see <http://ods.gmu.edu/>).
- Students must follow the university policy stating that all sound emitting devices shall be silenced during class unless otherwise authorized by the instructor.

### *Campus Resources*

- Support for submission of assignments to Tk20 should be directed to [tk20help@gmu.edu](mailto:tk20help@gmu.edu) or <https://cehd.gmu.edu/aero/tk20>. Questions or concerns regarding use of Blackboard should be directed to <http://coursessupport.gmu.edu/>.
- For information on student support resources on campus, see <https://ctfe.gmu.edu/teaching/student-support-resources-on-campus>
- **Notice of mandatory reporting of sexual assault, interpersonal violence, and stalking:** As a faculty member, I am designated as a “Responsible Employee,” and must report all disclosures of sexual assault, interpersonal violence, and stalking to Mason’s Title IX Coordinator per University Policy 1202. If you wish to speak with someone confidentially, please contact one of Mason’s confidential resources, such as Student Support and Advocacy Center (SSAC) at 703-380-1434 or Counseling and Psychological Services (CAPS) at 703-993-2380. You may also seek assistance from Mason’s Title IX Coordinator by calling 703-993-8730, or emailing [titleix@gmu.edu](mailto:titleix@gmu.edu).

**Other reminders:**

**Plagiarism Statement:** 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 (Statement of English Department at George Mason University).

**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, meaning 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://integrity.gmu.edu/>

**Other Concerns:** If you have concerns or issues relating to the content or conduct of the class, please talk with me directly. As a matter of policy, I do not respond to anonymous e-mails.

**For additional information on the College of Education and Human Development, please visit our website <https://cehd.gmu.edu/>.**

### EDLE 614.DL1 Weekly Course Schedule (Spring 2019)

Please Note: 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.

#### Class Schedule (Fall 2020) – August 24 to December 16

**Please note:** To accommodate the learning needs of the class, the topics and reading schedule may be amended during the semester.

DATE	TOPICS	ASSIGNMENT
August 24 to September 1	<ul style="list-style-type: none"><li>• Course Overview</li><li>• Money Matters</li><li>• Budget Workshop Overview</li></ul>	Meet with school principal and bookkeeper to identify school budget(s). Ask questions about policies and processes they use to be effective, efficient. This will become a two to five pager paper, due September 22 <sup>nd</sup> .
September 2 to 8	<ul style="list-style-type: none"><li>• School Vision, Mission, and Goals and School Budget</li><li>• Ethical/legal Issues and School Finance</li><li>• Budget Workshop Overview</li></ul>	Research these topics as they relate to your school or the school of your choosing.  <i>Begin to collect necessary data for Budget and Staffing Allocation Proposals</i>
September 9 to 15	<ul style="list-style-type: none"><li>• School Vision, Mission, and Goals</li></ul>	READ: Rebell & Wardenski: “Of Course Money Matters” at <a href="http://www.schoolfunding.info/">http://www.schoolfunding.info/</a>
September 16 to 22	<ul style="list-style-type: none"><li>• Ethical/Legal Issues and School Staffing</li></ul>	Working with your leadership team, identify processes for staffing. If you are at a secondary school, obtain last year’s course request data.  <i>Assignment Due: Budget Interview (50 pts)</i>

September 23 to 29	<ul style="list-style-type: none"> <li>Budget and Staffing</li> </ul>	<p><u>Begin your research related to the <b>Demographic information for budget and staffing allocation assignment</b></u></p>
September 30 to October 6	<ul style="list-style-type: none"> <li>Budget and Staffing (Part 2)</li> </ul>	<p>Begin creating your framework for your budget and / or staffing allotment requests</p>
October 14 to 20	<ul style="list-style-type: none"> <li>Recruitment and the Interview Process</li> </ul>	<p><u>Assignment due: <b>Demographic information for budget and staffing allocation assignment</b></u></p> <p>Either attend the SU interview night (date to be announced) or request to be involved in your school/district interview process</p>
October 21 to 27	<ul style="list-style-type: none"> <li>Interview Process</li> </ul>	<p>Create interview questions and a protocol that focus on needs that you believe to be most important – we will share these on a google doc.</p> <p><u>Staffing Allocation assignment Due (100 points)</u></p>
October 28 to November 3	<ul style="list-style-type: none"> <li>Resume and cover letter Writing</li> </ul>	<p>Do you have an updated resume and cover letter? Submit / share for feedback (<a href="https://www.canva.com/">https://www.canva.com/</a> and <a href="https://graphicriver.net/">https://graphicriver.net/</a> may help)</p> <p>We will have a shared google folder that you can share resumes/cover letters.</p>
November 4 to 10	<ul style="list-style-type: none"> <li>Working with Difficult Teachers</li> </ul>	<p><i>Budget Allocation Assignment Due (100 points)</i></p>
November 11 to 17	<ul style="list-style-type: none"> <li>Assisting the Marginal Teachers</li> </ul>	<p>Read, take notes, reflect, &amp; apply: TappingThePotential/TappingThePotential.pdf <a href="http://www.all4ed.org/files/archive/publications/">http://www.all4ed.org/files/archive/publications/</a></p>

November 18 to 24	<ul style="list-style-type: none"> <li>• <b>Supervision and Evaluation</b></li> </ul>	<p>Read, take notes, reflect and apply:  <u><a href="#">Teacher Quality and Student Achievement: Making the Most of Recent</a></u> at:  <u><a href="http://www.tgsources.org/publications/March2008Brief.pdf">www.tgsources.org/publications/March2008Brief.pdf</a></u>  and <u><a href="#">Teacher Quality and Student Achievement</a></u> at:  <u><a href="http://epaa.asu.edu/ojs/oldepaa/redirect/?v=8&amp;n=1">epaa.asu.edu/ojs/oldepaa/redirect/?v=8&amp;n=1</a></u></p>
December 2 to 8	<ul style="list-style-type: none"> <li>• <b>Support Personnel</b></li> <li>• <b>Legal Issues in the Workplace</b></li> </ul>	<p>Find a news article that identifies a legal issue that has made it to the media. Identify the issue and the legal outcome as well as anything that was of interest to you. Share this in the shared google doc.</p>
December 9 to 16	<ul style="list-style-type: none"> <li>• <b>Future of Human Resources</b></li> <li>• <b>Wrap-up session</b></li> <li>• <b>Feedback and moving forward</b></li> </ul>	<p><i>Grant Proposal Due (50 points)</i></p>

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

**Rationale**

Budget allocations in independent school settings must be prepared in a fashion that is both comprehensive and clearly understood by school personnel, board of directors, and parents. The primary goal of this assignment is to help students learn how to take a school revenues in dollar

amount; allocate it among needs at the school site consistent with the school's and board of directors' vision, mission, and goals; and present the allocation in a 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 an independent 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 paper should include the following components:

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**

	<b>Exceeds Expectations 4</b>	<b>Meets Expectations 3</b>	<b>Approaching Expectations 2</b>	<b>Falls Below Expectations 1</b>
NELP 1.1 Program completers understand and demonstrate the capacity to	The proposal specifies the participatory role of school stakeholders in helping to achieve	The proposal explains how the budget was developed so that stakeholders	The proposal is vague with respect to rationale and/or stakeholder participation.	The proposal is silent on the issues of rationale and stakeholder participation.

evaluate, develop and communicate a school mission and vision (10%)	the school vision through their active development and implementation of the budget.	will understand its rationale.		
NELP 6.2 Program completers understand and demonstrate the capacity to advocate for equitable resourcing plan (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.
NELP 6.1 Program completers understand and demonstrate the capacity to implement management, and communication (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.
NELP 4.4 Program completers understand and demonstrate assessment practices (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.
NELP 1.1 Program completers demonstrate the capacity to evaluate and design priorities that include data use, and equity (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.

NELP 2.1 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.
NELP 5.3 Program completers understand and demonstrate the capacity to advocate for the needs of their school and community (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 <b>free</b> 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 and board of directors' 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 paper should include the following components:

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**

	<b>Exceeds Expectations 4</b>	<b>Meets Expectations 3</b>	<b>Approaching Expectations 2</b>	<b>Falls Below Expectations 1</b>
NELP 1.1	The proposal specifies the	The proposal explains how the	The proposal is vague with	The proposal is silent on the

Program completers understand and demonstrate the capacity to evaluate, develop and communicate a school mission and vision (10%)	participatory role of school stakeholders in helping to achieve the school vision through their active development and implementation of the staffing allocation.	staffing allocation was developed so that stakeholders will understand its rationale.	respect to rationale and/or stakeholder participation.	issues of rationale and stakeholder participation.
NELP 2.1 Program completers understand and demonstrate the capacity to communicate about, and model equity that support educational success (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.
NELP 6.2 Program completers understand and demonstrate the capacity to advocate for a data-informed and equitable resourcing plan (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.
NELP 6.1 Program completers understand and demonstrate the implementation of the operation 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
NELP 3.1 Program completers understand and demonstrate the capacity to use data	The spreadsheet persuasively supports the cover memo and demonstrates	The spreadsheet is consistent with the cover memo and shows that all district-	The spreadsheet has some positive features, but it either does not fully utilize the	The proposal does not adequately allocate district-

to design for a supportive and inclusive school culture (15%)	creative and effective use of the district allocation of human resources.	allocated human resources are put to good use.	district staffing allotment and/or it contains questionable staffing choices.	allotted human resources.
NELP 3.3 Program completers understand and demonstrate the capacity to advocate for equitable instruction (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.
NELP 4.1 Program completers understand and demonstrate the capacity to implement high-quality and equitable academic and non-academic instructional practices that support equity (15%)	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.	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 staffing 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 <b>free</b> of errors—both verbal and numerical.	The assignment has a few errors.	The assignment has some errors.	The assignment has numerous errors.

**ASSIGNMENT  
GRANT PROPOSAL  
50 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 \$5,000, unless with special permission from the central office.

## Grant Proposal Assessment Rubric

	<b>Exceeds Expectations 4</b>	<b>Meets Expectations 3</b>	<b>Approaching Expectations 2</b>	<b>Falls Below Expectations 1</b>
<b><u>Statement of Need (20%)</u></b> 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.
<b><u>Plan to Meet the Need (20%)</u></b> 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.
<b><u>Expected Outcomes (20%)</u></b> 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.
<b><u>Evaluation of the Project (15%)</u></b> 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.
<b><u>Budget (15%)</u></b> 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.
<b><u>Grammar &amp; Mechanics (10%)</u></b> Any writing submitted for public review should be free of errors.	The grant proposal is <b>free</b> of errors.	The grant proposal contains a few errors.	The grant proposal contains some errors.	The grant proposal contains numerous errors.