

## **EDU 553 School Finance for Principals Schedule and Activities**

### **Class One**

#### **Topics:**

##### Course Overview:

Resource Leadership and Its Central Functions Related to Obtaining and Allocating Resources is not a **“VALUE”** neutral activity.

Flow Chart of big picture of budgeting cycle in Maine

Societal Context for “resourcing” schools at the local, state, federal levels including issues of equity, power, and control.

#### **Assignment for Class Two**

##### **Organizational Profile**

Begin collecting information from your school system:

NCLB Plan

Written budget policies and procedures

Any documents you can find that relate to how your school develops a budget (e.g. mission statement, handbooks, forms)

Long range plans

Collect materials used in your school budget development and approval process.

A copy of the page in the Legislative District Education Report for your system

Copy of your property tax bill

What types of needs assessments are used to build the budget in your school?

Other material available related to budget development within your school system. .

##### **Journal Prompt #1**

“As a school leader the “values” I hold in developing a budget are: “  
Rationale for your position. (Relate this piece to issues around personnel, materials, climate, philosophy)

##### **Read:**

Waggoner: Chapters 1 & 2 (Complete the “Critical Knowledge Survey”)

Gravelle & Silvernail: pp. i – 21

Handout: “The Economics of Education”

## Class Two

### Topics:

Demographics of Maine school systems  
Enrollment – impact on budgeting  
Critical Knowledge Survey Discussion  
Impact of Personal Values on Budget Decisions  
Develop questions to ask your principal and/or superintendent regarding your school building/systems budget process  
Economics 101: Educationally, what do Maine citizens get for their money?” “What do they want?”

### Assignment for Class Three

#### Organizational Profile:

Continue to collect materials used in your school budget development and approval process.  
Legislative District Education Report for your system  
**Copy of your property tax bill**  
Include a list of questions asked of school administrators

#### Journal Prompt: #2

Interview your building administrator and describe the budget process used in your school system. How does this process relate to your values, described in the first journal prompt?

#### Read:

Sorenson & Goldsmith: Chapter 1 (Complete the study guide)  
Waggoner: Chapters 3 & 4  
Gravelle & Silvernail: pp. 22-48  
*Essential Programs and Services* (found on the course web site)  
Handouts: Financing Public K-12 Education: Examples of Taxation Options in Selected States

## Class Three

### Topics:

Overview  
Maine School Funding Formula (Essential Programs and Services)  
Budget Approval Process  
Acquiring Resources  
How do systems create and implement a planning process?  
Board, Superintendent, Principal, Teacher, Parent groups, what role does each play?  
Calculate Property Tax

## **Assignments for Class Four**

### **Organizational Profile:**

What kinds of needs assessment is done to build the budget in your school?

### **Case Study:**

Develop a written response to Case Study Problem #1 (handout)

### **Journal Prompt: #3**

As the school leader, what are likely to be the programmatic and financial issues you will face in developing a school budget?

### **Read:**

Sorenson & Goldsmith: Chapters 2 & 3 (complete the study guides)

Waggoner: Chapter 5

Gravelle & Silvernail: pp. 48-84

Handout: School Funding in Maine: The Case for Reform

## **Class Four**

### **Topics:**

School Culture

Kinds of Data Used for Budget Development

Relationship between vision/values and budget

Revenue sources

ED 281

Share copies of District Budget Information

## **Assignment for Class Five**

### **Organizational Profile:**

Continue to collect material

### **Journal Prompt: #4**

Use the information contained in the end of the year form ED-M-45, for the school year 2005-2006 (if available) or the table labeled, "Per Pupil Expenditures 2005-2006 Percentages," found on the UMF course web site to calculate the percentage of the total budget spent on: Regular Education, Special Education, Facilities, Debt Service, Support Services, Transportation, School Administration, System Administration, Other Instruction, Vocational Education, and Other. Develop a chart similar (create both a pie chart for your system and then a bar graph that has the data from the system you analyzed compared to the State Average percentages for each

category.) Refer to Section 48: "Education Expenditures by Category" found on page 73 in *The Conditions of K-12 Public Education 2008* report.

Write an analysis comparing your school systems expenditures to that of the State average. Base your analysis on the table you constructed for this class.

**Case Study:**

Develop a written response to Case Study Problem #2 (handout)

**Read:**

Sorenson & Goldsmith Chapter 6 (complete the study guide)

Waggoner: Chapters 6-8

Handouts: State Share Percentages in School Funding Formulas for 98-99.

Essential Programs and Services: The Basis for a New Approach for Funding Maine's Public Schools  
Reforming Maine's Education Funding Process

**Class Five**

**Topics:**

Chart of Accounts

ED 281 (continue review)

Review District Budget Formats and Information for commonalities/differences

**Assignment for Class Six:**

**Organizational Profile:**

Be prepared to share with the class how information on policies, contracts, handbooks, etc. that define how human resources are handled in your school.

**Case Study:** Write a response to Case Study #3

**Read:**

Sorenson & Goldsmith: Chapter 4 (complete the study guide)

Waggoner: Chapters 9 & 10

LD 1 Progress Report 2007 (Sections I, II, III, V, & VII) **posted on the course web site**

## **Class Six**

### **Topics:**

Models for Budget Development  
District/School System Budgeting Process

### **Assignment for Class Seven:**

#### **Organizational Profile:**

Be prepared to share with the class the practices employed by your school system for:

Evaluating the effectiveness of programs  
Identifying developmental needs of program and personnel  
Professional development programming

#### **Read:**

Sorenson & Goldsmith: Chapter 5 (complete the study guide)  
Handouts: The Chocolate Mile Compromise  
Lives of a Rural Principal  
Tale of the First Year  
Resource Allocation  
On Being a Principal: The Rewards and Challenges of School Leadership

## **Class Seven**

### **Topics:**

Resource deployment/decisions  
What's a principal to do? Activity  
List of Funds and Responsibilities Activity  
Decisions related to values  
Budget process  
Umbrella of Responsibilities  
Allocating and monitoring the "hard" resources (money, materials, equipment). The beyond the "curriculum" functions, co-curricula, food services, etc.  
Leadership challenges for the principal (internal accounting, fund raising, inventory, supervising)

## Assignment for Class Eight

### Organizational Profile:

Turn in your OP

### Journal Prompt: #5

Write a persuasive paper defending educational expenditures related to “value-added.”

### Read:

Sorenson & Goldsmith: Chapter 7 (complete study guide)  
Making Sense as a School Leader: Trusting Yourself (Study Questions)

## Class Eight

### Topics:

Leadership's Role in the Budget Process

Leadership Style Inventories

The “soft” resources

Managing Human Resources wisely:

“If the goal is to have every staff member at the top of his or her game every hour of every day, what does the leader need to do?”

Intersection of supervision, professional development and curriculum evaluation and development.

Acquiring expertise coaching, mentoring, developing collaborative relationships, and finding time and space.

Skills: facilitation, discerning human needs and evaluation

Turn in OP and Journal Prompt

### Assignments for Class Nine:

#### Read:

*The Seven Habits of Highly Effective People: Principles of Personal Management*

*Personal Leadership Application Workbook*

Organizational Behavior in Education Theory X & Y

#### Self Analysis

Students will complete a self-assessment related to school leadership and bring it to the next class. This self-assessment will be used to develop a paper analyzing the impact their leadership style has on issues related to budget development.

## **Class Nine**

### **Topics:**

Reality vs. Ideal  
Implications for Leaders  
Share OP with classmates

### **Assignment for Class Ten:**

#### **Self Analysis**

Develop a paper analyzing the impact of your leadership style on issues related to budget development.

#### **Course Evaluation:**

Complete course evaluation

## **Class Ten**

### **Topics:**

Catch Up  
Turn in Self Analysis Papers  
Complete course evaluations