

## EEA 536: School Finance and Operations

### School of Education and Leadership

3 Credits  
Effective Date: 4/1/2022  
Grading Type: Decimal  
Pre-requisites: None

*Access to the Internet is required.*

*All written assignments must be in Microsoft-Word-compatible formats.  
See the library's APA Style Guide tutorial for a list of resources that can help you use APA style.*

*Prerequisite Courses: N/A*

### Faculty Information

Professional experience information for instructors is found under Faculty online at <https://www.cityuniversity.ca/our-faculty/>

### Contact Information

Contact information for instructors is found under Faculty Information online at <https://www.cityuniversity.ca/our-faculty/>

### Course Description

Students develop an understanding of how schools are financed and knowledge of best practices in the acquisition of resources, budgeting, accounting, and the fiscal stewardship of the school's human and financial resources. Topics include the development of the budget priorities, formulation of the budget, the administration of budget expenditures, and administration of the school's facilities and financial resources. Students become knowledgeable about the budgeting process and the school financial management responsibilities of the educational leader.

### Course Resources

Required and recommended resources to complete coursework and assignments are found on the course [Reading List](#). Access is provided through the *Reading List* link in your online course as well as from the library homepage (“Find Your Reading List” button).

**Note:** Required resources that must be purchased by the student are tagged “Purchase from a vendor of your choosing.” Required resources with a direct link, “Available through CityU Library”, are available electronically at no cost to students.

Students in Canada may purchase course resources from the [Canada Bookstore](#), and students outside the U.S. and Canada should contact their advisor or textbook coordinator for additional information.

## Course Outcomes

In this course, learners:

- Examine the fiscal responsibility of educational institutions, including the student’s school and district, in creating a supportive environment for a successful and high-quality K-12 experience for all youth.
- Examine the fiscal responsibility of educational institutions, including the student’s school and district, in developing sustainability goals.
- Evaluate sound financial practices in developing budgets.
- Evaluate the school system's practices in setting priorities for budget development within provincial/territorial and district regulations.
- Evaluate staff, parent, and community involvement related to development of the school’s budget.

## Additional Information

### Declaration of Inclusion

The CityU Master’s in Educational Leadership program honours human diversity in all its forms and is committed to the principle of universal human dignity. We respectfully acknowledge that our program resides on the ceded and unceded territories of our First Nations and our programming acknowledges the First Nations, & many others whose histories, languages, & cultures continue to influence our vibrant Canadian communities. We further acknowledge that our learning community is greatly enriched through the voices and perspectives of staff, faculty, and students from all intersections of society including LGBTQ+, BIPOC and diversely abled communities.

### Indigeneity

City University philosophically and pragmatically supports the First Nations perspective of learning as being rooted in reciprocity, the relational, and the experiential. City University instructors are required to infuse into their curriculum the traditional teachings from many indigenous communities. This blend of indigenous knowledge allows for cultural uniqueness and practices that come from the reflections on the telling of stories, traditional teachings, and the understandings of ceremony.

## Sustainable Development Goals

In 2015 the United Nations created 17 goals to achieve a sustainable world by the year 2030 ([THE 17 GOALS | Sustainable Development \(un.org\)](https://un.org/sustainabledevelopment)) City University actively supports these goals and requires that each course syllabus articulate and include as part of its content, at least two of these goals that relate to the course's objectives and outcomes. Through these actions, City University hopes to inspire our students to help create a more inclusive, equitable, and safe world for the future.

## Grading Scale

The grades earned for the course will be derived using City University of Seattle's decimal grading system, based on the following:

<b>Overview of Required Assignments</b>	<b>% of Final Grade</b>
Preparation and Participation	25%
Reflection Report and Oral Presentation on Interviews with Principal and Superintendent or School System Financial Officer	25%
Analysis of a Collective Bargaining Agreement	25%
Allocation of Resources Aligned with respect to relevant Provincial/Territorial leadership Standards	25%
<b>TOTAL</b>	<b>100%</b>

## Course Assignments and Grading

### Preparation and Participation (25% of Final Grade)

Class attendance and participation is an integral part of this course. Coming prepared to class is essential because the information, knowledge, skills, and expertise they exchange with peers and instructors contributes toward a strong learning community. It is highly important that students attend and actively participate in class.

<b>Components</b>	<b>% of Grade</b>
Required activities/readings/homework completed	40%
Collaborative discussions	30%
Regular attendance and preparation	30%
<b>TOTAL</b>	<b>100%</b>

**Reflection Report and Oral Presentation on Interviews with Principal and Superintendent or School System Financial Officer (25% of Final Grade)**

The student interviews a school administrator (principal) and a central office supervisor or, in larger districts, the central administrative officer who serves as the financial officer for the school or program. The purpose of the interviews is to learn what the leaders consider important for school or program administrators to know regarding school/program finance, management, and district-level budgeting; how school administrators are expected to participate in the budgeting process and fiscal routines; and how priorities are established and maintained. Prepare a 3-5 page written reflection of each interview. Present a summary to the class.

<b>Components</b>	<b>% of Grade</b>
Organization and clarity of issues with appropriate depth of analysis, synthesis, and evaluation, in a written report.	50%
Voice -- statement and support of opinion in written and oral presentation.	25%
Ease in making presentation and engaging the audience; clarity, pace, and organization.	25%
<b>TOTAL</b>	<b>100%</b>

**Analysis of a Collective Bargaining Agreement (25% of Final Grade)**

The student demonstrates an understanding of the importance of collective bargaining agreements in developing resource forecasts as well as short- and long- term school or program plans for instruction, operations, capital improvements, professional development, etc. Strategies for win-win bargaining as well as more traditional models are addressed. Students are to use a current contract from their local school district and identify the requirements for the school community, school and/or program resources to include the allocation of revenues, time, and materials. Students will analyze school, school district, provincial/territorial, and federal documents to mitigate risk and respond to legal and ethical issues. Append a copy of the bargaining agreement(s) to the analysis. The analysis and summary are an APA formatted paper not to exceed five (5) pages.

<b>Components</b>	<b>% of Grade</b>
Risk management	15%
Organization and clarity of issues with appropriate depth of analysis, synthesis, and evaluation, in a written report.	35%
Voice -- statement and support of opinion in written and oral presentation.	25%
Ease in making presentation and engaging the audience; clarity, pace, and organization.	25%
<b>TOTAL</b>	<b>100%</b>

**Allocation of Resources Aligned with School Learning Improvement Plan and relevant Provincial/Territorial Leadership Standards (25% of Final Grade)**

The student gathers and analyzes data to determine whether and how the systems in the school or program work to create a safe, efficient, and effective learning environment. Administrators are expected to lead a budget development process with staff that is student-focused and based on the prioritized and targeted interventions necessary to enhance student learning (usually expressed through a school learning improvement plan). The student creates and analyzes a current school learning improvement plan (SLIP), its systems for allocation of revenues, expenditures, time, human, and material resources. The student references the data and artifacts and evaluates to what extent these systems work to support a safe, efficient, and effective learning environment. Students will analyze school, school district, provincial/territorial, and federal documents to ensure high standards of learning for all K-12 youth. Based on the analysis, reflection, and evaluation, the student recommends changes in resource allocation(s) and/or in goals for student learning improvement. Students are to frame the data-driven rationale and recommendations for presentation to a school or program leadership team. Students will address budget as it relates to concerns of Indigeneity, Cultural Differences, and Sustainability.

<b>Components</b>	<b>% of Grade</b>
Performance standards	15%
Content -- presentation of issues with appropriate depth of analysis, synthesis, and evaluation.	35%
Relevance -- presentation of an understanding of the SLIP's relationship to the allocation of resources.	25%
Clarity -- focused, organized, appropriately formatted, and grammatically correct presentation of ideas.	25%
<b>TOTAL</b>	<b>100%</b>

## **Course Policies**

### **Late Assignments**

A critical aspect of management is to meet predefined deadlines. Therefore, all assignments are expected to be submitted when due. No late assignments are accepted. Life-situations do occur. When an issue arises coordinate with the instructor prior to the assignment's due date and the due date may be adjusted. It is in the best interest of the student to ensure that all assignments are submitted on time.

### **Participation**

You are responsible for meeting or exceeding the participation requirements as listed in the syllabus and in the Learning Management classroom.

### **Professional Writing**

Assignments require error-free writing that uses standard English conventions and logical flow of organization to address topics clearly, completely, and concisely. CityU requires the use of APA style.

## **University Policies**

Students are responsible for understanding and adhering to all CityU's academic policies. The most current versions of these policies can be found in the [University Catalog](#) that is linked from the CityU Web site.

### **Antidiscrimination**

City University in Seattle and its staff and faculty are committed to supporting our students. We value equity, diversity, and inclusion as a way of life as well as the educational opportunities it provides. City U will not tolerate any form of discrimination based on race, color, ethnicity, sexual orientation, gender identification, socioeconomic status, or religious values. If you have experienced any discrimination based on any of the above, we encourage you to report this to the University. Please report this to your instructor. If you do not feel safe reporting this to your instructor, please report to the Provost or to the Vice President of Student Affairs.

### **Non-Discrimination & Prohibition of Sexual Harassment**

City University of Seattle adheres to all federal, state, and local civil rights laws prohibiting discrimination in employment and education. The University is committed to ensuring that the education environment is bounded by standards of mutual respect and safety and is free from discriminatory practices.

In the U.S., the University is required by Title IX of the Education Amendments of 1972 to ensure that all its education programs and activities do not discriminate based on sex/gender. Sex includes sex, sex stereotypes, gender identity, gender expression, sexual orientation, and pregnancy or parenting status. Sexual harassment, sexual assault, dating and domestic violence, and stalking are forms of sex discrimination, which are prohibited under Title IX and by CityU policy. CityU also prohibits retaliation against any person opposing discrimination or participating in any discrimination investigation or complaint process internal or external to the institution. Questions regarding Title IX, including its application and/or concerns about noncompliance, should be directed to the Title IX Coordinator. For a complete copy of the policy or for more information, visit <https://my.cityu.edu/titleix> or contact the Title IX Coordinator.

In Canada, in compliance with the British Columbia Human Rights Code, the Alberta Human Rights Act, WorksafeBC, and the Workers' Compensation Board of Alberta, the University believes that its environment should always be supportive and respectful of the dignity and self-esteem of individuals. Discrimination, harassment, and bullying conduct, whether through person-to-person behaviour or via electronic communications such as email or social media is not acceptable and will not be tolerated. As an educational institution, it is our responsibility to cultivate an environment of excellence, equity, mutual respect and to recognize the value and potential of every individual. The University will take all necessary steps to meet or exceed the requirements of the law to prevent discrimination, harassment, and bullying. The Respectful Workplace Policy for the prevention of discrimination, harassment and bullying policy and procedure can be found at <https://www.cityu.edu/discover-cityu/about-cityu/> under the Policies section or at <https://www.cityuniversity.ca/about/>.

### **Religious Accommodations**

City University of Seattle has a policy for accommodation of student absences or significant hardship due to reasons of faith or conscience, or for organized religious activities. The University's policy, including more information about how to request an accommodation, is available in the University Catalog and on the **my.cityu.edu** student portal. Accommodations must be requested by the 20% mark of this course (e.g., day 14 of a ten-week course, day 7 of a 5-week course) using the Religious Accommodations Request Form found on the student dashboard in the my.cityu.edu student portal.

### **Academic Integrity**

Academic integrity in students requires the pursuit of scholarly activity that is free from fraud, deception, and unauthorized collaboration with other individuals. Students are responsible for understanding CityU's policy on academic integrity and adhering to its standards in meeting all course requirements. A complete copy of this policy can be found in the [University Catalog](#) under *Student Rights and Responsibilities* on the page titled *Academic Integrity Policy*.

### **Attendance**

Students taking courses in any format at the University are expected to be diligent in their studies and to attend class regularly.

Regular class attendance is important in achieving learning outcomes in the course and may be a valid consideration in determining the final grade. For classes where a physical presence is required, a student has attended if they are present at any time during the class session. For online classes, a student has attended if they have posted or submitted an assignment. A complete copy of this policy can be found in the University Catalog in the section titled *Attendance* under *Student Rights & Responsibilities*.

### **Final Assignment Due Date**

Final assignments for each class at CityU must be due on or before the final date of the course as indicated in the university's course information system. Due dates that extend beyond the final date of the course may negatively impact tuition funding for students.

## **Support Services**

### **Disability Services Accommodations Statement**

Students with a documented disability who wish to request academic accommodations are encouraged to contact Disability Support Services to discuss accommodation requests and eligibility requirements. Please contact Disability Support Services at [disability@cityu.edu](mailto:disability@cityu.edu) or 206.239.4752 or visit the Disability Support Services page in the my.cityu.edu portal. Confidentiality will be observed in all inquiries. Once approved, information about academic accommodations will be shared with course instructors.

### **Library Services**

CityU librarians are available to help students find the resources and information they need to succeed in this course. Contact a CityU librarian through the Ask a Librarian service, or access library resources and services online, 24 hours a day, seven days a week.

### **Smarthinking Tutoring**

CityU students have access to free online tutoring offered through Smarthinking, including writing support, from certified tutors 24 hours a day, seven days a week. Contact CityU's Student Support Center at [mycityusupport@cityu.edu](mailto:mycityusupport@cityu.edu) to request a username and password.