



Course Number: EDUC 746

Course Title: Financial Management for School Administrators

School/Division: School of Education and Behavioral Sciences

Term: Summer 2022 / July 5- September 12

Credits: 3

Instructor Name: Dr. Dale K. Castro

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Virtual Office Hours: Available by appointment

University Course Catalog Description

Provides a general overview for administrators regarding financial institutional planning and accountability for organizational success.

Conceptual Framework

The Education Division's Conceptual Framework is based upon a set of beliefs that flow from the University's vision and mission statements, the Division's vision and mission statements, and the core academic beliefs of Chaminade University. These values and beliefs are based on the Catholic Marianist principles; a commitment to mentor teacher and educational leader candidates to their fullest potential; a commitment to teaching, scholarship and research; and a commitment to serve the university and the larger community.

Education Division Mission Statement

The Education Division's mission is to foster the development of knowledgeable, proficient, and reflective teachers and educational leaders. Our programs are based in the liberal arts tradition, Catholic Marianist values, current research, best practice, and professional standards. In this context we develop educators who demonstrate ethical, effective and culturally responsive practices, and a commitment to building a just and peaceful society.

Marianist Values

1. Educate for formation in faith
2. Provide an integral quality education
3. Educate in family spirit
4. Educate for service, justice and peace
5. Educate for adaptation and change

Program Learning Outcomes (PLO)

1. Describe the impact of socio-economic, legal, and ethical factors at an educational setting that promotes service, justice, and peace in a multicultural learning environment.
2. Synthesize best practices and evidence-based research into the effective operations of a campus that are relevant, integral, and essential to the success of a school.
3. Define a vision for a school and organizational change processes that work towards providing an excellent education, promoting student learning, and the development of the whole person.
4. Examine effective skills in promoting a positive school culture for all and the means for adaptation and change.
5. Articulate collaboration and communication with various internal/external stakeholders associated with a school setting.

Course Learning Outcomes (CLO)

1. Develop an understanding of the school budgeting process. (PLO 1, 4)
2. Become familiar with the relationship between vision, values, and national standards. (PLO 2)
3. Apply principles of planning, budgeting, and accounting to support programmatic implementation. (PLO 1)
4. Reflect upon the relationship of fiduciary duties, transparency, and political nuances. (PLO 3, 4)

Learning Materials

- The Principal's Guide to School Budgeting, 3rd edition. (2017) Richard Sorenson and Lloyd Goldsmith. ISBN: 9781506389479
- Other learning materials will be provided as needed.

Assessment

Assignments	Max Points
Biography	10
Metaphor	10
Mini Budget	20
GOSA	20
Myth	20
Needs Assessment	20
Budget Calendar	20
Budget Proposal Capstone Project	100
Total	200

May be subject to change based on the dynamics of current events. Late assignments submitted one-day late will receive a 10% deduction and two-days late with a 25% deduction. No late assignments will be accepted after. If there is an emergency, make sure to contact me before the due date of an assignment. No work will be accepted after the last day of the course.

Grading scale

100-90%	180-200 points	A
89-80%	160-179 points	B
79-70%	140-159 points	C
69-0%	139 points or below	F

Schedule

Week	Topic	Tasks
Week 1 7/5 – 7/10	Read and review the Introduction and Resource sections of the book, "The Principal's Guide to School Budgeting" Third Edition. Sorenson, Richard D., Goldsmith, Lloyd M.. The Principal's Guide to School Budgeting. SAGE Publications. Kindle Edition.	Generate a biography of who you are and your current working environment. Detail your role and experiences with school budgeting. 1-2 page maximum. Biography 10 points Assignment due: July 10, 2022
Week 2 7/10 - 7/17	Read Chapter 1. The Budget–Vision Relationship and the National Standards Sorenson, Richard D., Goldsmith, Lloyd M.. The Principal's Guide to School Budgeting (p. 28). SAGE Publications. Kindle Edition.	Select one of the Professional Standards for School Leaders (PSEL) and write a metaphor citing learning from this chapter and from your own experiences.

		<p>Utilize figure 1.1 as a guide, but feel free to apply your own ingenuity to this task.</p> <p>2-3 page maximum.</p> <p>Metaphor 10 points</p> <p>Assignment due: July 17, 2022</p>
Week 3 7/17 - 7/24	<p>Read Chapter 2. Culture, Data, Conflict Resolution, and Celebrating Success</p> <p>Sorenson, Richard D., Goldsmith, Lloyd M.. The Principal's Guide to School Budgeting (p. 113). SAGE Publications. Kindle Edition.</p>	<p>Create a MINI Budget 20 points</p> <p>Apply the conceptual framework from Figure 2.1</p> <p>Integrated Vision, Planning, and Budgeting to create a mini budget. You may use the information from Case Study Application #2: LBJ Middle School or a scenario from your own experience.</p> <p>Guiding questions:</p> <ol style="list-style-type: none"> 1. Why are you selecting this focus? 2. How will you present the budget? 3. How will you demonstrate planning, visioning, budgeting, and monitoring responsibility? <p>2 page maximum (20 points)</p> <p>Assignment due: July 24, 2022</p>
Week 4 7/24 - 7/31	<p>Read Chapter 3. A Model for Integrating Vision, Planning, and Budgeting</p> <p>Sorenson, Richard D., Goldsmith, Lloyd M.. The Principal's Guide to School Budgeting (p. 186). SAGE Publications. Kindle Edition.</p>	<p>Create GOSA Example 20 points</p> <p>Create a Goal Objective Strategy Action example from your problem of practice experience. Reference Figure 3.2</p> <p>1 page maximum (10 points)</p> <p>Assignment due: July 31, 2022</p>
Week 5 7/31 - 8/7	<p>Read Chapter 4. Understanding the Budgeting Process</p> <p>Sorenson, Richard D., Goldsmith, Lloyd M.. The Principal's Guide to School Budgeting (p. 243). SAGE Publications. Kindle Edition.</p>	<p>Addressing a Myth 20 points</p> <p>Select a "budgeting myth" from this chapter or create your own and expand upon your thoughts.</p> <p>2 page maximum (10 points)</p> <p>Assignment due: August 7, 2022</p>

Week 6 8/7 - 8/14	<p>Read Chapter 5. Effective, Efficient, and Essential Budgeting Practices</p> <p>Sorenson, Richard D., Goldsmith, Lloyd M.. The Principal's Guide to School Budgeting (p. 332). SAGE Publications. Kindle Edition.</p>	<p>Conduct a Needs Assessment 20 points</p> <p>Utilize the format from Table 5.2 or your own to complete a needs assessment from your problem of practice experience.</p> <p>2 page maximum (20 points)</p> <p>Assignment due: August 14, 2022</p>
Week 7 8/14 - 8/21	<p>Read Chapter 6. Building the School Budget</p> <p>Sorenson, Richard D., Goldsmith, Lloyd M.. The Principal's Guide to School Budgeting (p. 332). SAGE Publications. Kindle Edition.</p>	<p>Create a Budget Calendar</p> <p>In a chart or spreadsheet, develop a budget calendar by month to establish key milestones for actions necessary when creating an annual school budget. Select the items you determine to be essential each month to complete.</p> <p>1 -2 page maximum (20 points)</p> <p>Assignment due: August 21, 2022</p>
Weeks 8-10 8/21 - 9/12	<p>Capstone Project</p> <p>Reminder that this is worth 50% of your grade. Please spend the appropriate time working on it. Please seek clarification ahead of time should you require some assistance with this project.</p>	<p>Capstone Project</p> <p>Select a budgetary topic of interest and generate a budget proposal including, but not limited to these elements:</p> <p>A. Rationale, Data, Goals, and Outcomes</p> <p>B. Key Stakeholder Involvement and Roles</p> <p>C. Expenditure Prioritization, Cost, Funding Source(s)</p> <p>D. Formative and Summative Review Schedule</p> <p>E. Key Considerations (from what you have learned from the readings) You can elect to utilize a structure from the book or one of your own choosing.</p> <p>Assignment due: Wednesday, September 7, 2022</p>

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May be subject to change based on the dynamics of current events.

Online Course Guidelines

- Our main online learning management system (LMS) platform utilizes Canvas. Please make sure to review the Student Tutorial located on your course dashboard regarding instructions on accessing and submitting materials and assignments. Also, if you have any questions, please make sure to contact me and I can assist you on navigating the course. We will also utilize Zoom or a similar platform for live online class sessions if the need arises.
- Netiquette Guidelines: Students should communicate with each other using the same common courtesy, politeness, and appropriate online behaviors as we would in a face-to-face environment: a) Respect the opinions of others and their right to disagree; b) Keep replies and comments focused on the relevant topic; d) Post discussions and assignments in a timely fashion so that others can have sufficient time to review and reply.
- Discussion Participation: Class participation is a very important part of the learning process in this course. You will be evaluated on the quality of your contributions and insights. Quality comments possess one or more of the following properties: Offers a different and unique, but relevant, perspective; contributes to moving the discussion and analysis forward; transcends simply stating "I agree," and demonstrates some reflective in-depth thinking.

Writing Standards

All work submitted by Chaminade University students must meet the following writing standards. Written assignments should:

1. Use correctly the grammar, spelling, punctuation, and sentence structure of Standard Written English.
2. Develop ideas, themes, and main points coherently and concisely.
3. Adopt modes and styles appropriate to their purpose and audience.
4. Be clear, complete, and effective.
5. Carefully analyze and synthesize material and ideas borrowed from sources. In addition, the sources of the borrowed material should be correctly acknowledged to avoid plagiarism (see Plagiarism).

Academic Honesty

Violations of the Honor Code are serious. They harm other students, your professor, and the integrity of the University. Alleged violations will be referred to the Office of Judicial Affairs. If found guilty of plagiarism, a student might receive a range of penalties, including failure of an assignment, failure of an assignment and withholding of the final course grade until a paper is turned in on the topic of plagiarism, failure of the course, or suspension from the University.

Violations of Academic Integrity - Violations of the principle include, but are not limited to:

- Cheating: Intentionally using or attempting to use unauthorized materials, information, notes, study aids, or other devices in any academic exercise.
- Fabrication and Falsification: Intentional and unauthorized alteration or invention of any information or citation in an academic exercise. Falsification is a matter of inventing or counterfeiting information for use in any academic exercise.
- Multiple Submissions: The submission of substantial portions of the same academic work for credit (including oral reports) more than once without authorization.
- Plagiarism: Intentionally or knowingly presenting the work of another as one's own (i.e., without proper acknowledgment of the source).
- Abuse of Academic Materials: Intentionally or knowingly destroying, stealing, or making inaccessible library or other academic resource materials.
- Complicity in Academic Dishonesty: Intentionally or knowingly helping or attempting to help another to commit an act of academic dishonesty.

Plagiarism includes, but is not limited to:

- Copying or borrowing liberally from someone else's work without his/her knowledge or permission; or with his/her knowledge or permission and turning it in as your own work.

- Copying of someone else's exam or paper.
- Allowing someone to turn in your work as his or her own.
- Not providing adequate references for cited work.
- Copying and pasting large quotes or passages without properly citing them.

Title IX Compliance

Chaminade University of Honolulu recognizes the inherent dignity of all individuals and promotes respect for all people. Sexual misconduct, physical and/or psychological abuse will NOT be tolerated at CUH. If you have been the victim of sexual misconduct, physical and/or psychological abuse, we encourage you to report this matter promptly. As a faculty member, I am interested in promoting a safe and healthy environment, and should I learn of any sexual misconduct, physical and/or psychological abuse, I must report the matter to the Title IX Coordinator. If you or someone you know has been harassed or assaulted, you can find the appropriate resources by visiting Campus Ministry, the Dean of Students Office, the Counseling Center, or the Office for Compliance and Personnel Services.

Disability Access

The University is committed to providing reasonable accommodations for all persons with disabilities. This syllabus is available in alternate formats upon request. Students who need accommodations must be registered with Student Disability Services. Students with special needs who meet criteria for the Americans with Disabilities Act (ADA) provisions must provide written documentation of the need for accommodations to Kokua Ike: Center for Student Learning by the end of week three of the class, in order for the instructor to plan accordingly. Failure to provide written documentation will prevent your instructor from making the necessary accommodations. If you would like to determine if you meet the criteria for accommodations, contact ada@chaminade.edu.

Attendance Policy

As stated in the Chaminade University Catalog, students are expected to attend all classes for courses in which they are registered. Students are expected to attend all classes in which they are registered. The student should notify their instructors when illness or other extenuating circumstances prevents them from attending class and make arrangements to complete missed assignments. Not meeting the attendance requirements may result in lowering of the grade, withdrawal from the course, or failing the course. The instructor will specify and enforce expectations for online participation and receipt of assignments appropriate to the design of the course.

Excused Absences

Since it is expected that students will participate in all class sessions, excused absences are only granted in exceptional situations where evidence is provided by the student to the instructor. Students should notify their instructors when a situation prevents them from attending class and make arrangements to complete missed assignments. While notification of the instructor by a student that he/she will be absent is courteous, it does not necessarily mean the absence will be excused.

Unexcused Absences

Chaminade University student policy states that in cases where unexcused absences are equivalent to more than a week of classes, the instructor has the option of lowering the grade.