



## **EDUC 746 Course Syllabus**

3140 Waiālae Avenue - Honolulu, HI 96816

[www.chaminade.edu](http://www.chaminade.edu)

**Course Number:** EDUC 746

**Course Title:** Financial Management for School Administrators

**School/Division:** School of Education and Behavioral Sciences

**Term:** Fall 2024 / September 30 – December 9

**Credits:** 3

**Instructor Name:** Dr. Dale Castro

**Email:** dale.castro@chaminade.edu

**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, peace, and the integrity of creation
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
<b>Total</b>	<b>200</b>

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 9/30 – 10/6	Read and review the <b>Introduction and Resource</b> 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 pages maximum. <b>Biography 10 points</b>  <b>Assignment due: 10/6</b>
Week 2 10/7 – 10/13	<b>Read Chapter 1. The Budget-Vision Relationship and the National Standards</b>	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>Sorenson, Richard D.,Goldsmith, Lloyd M.. The Principal's Guide to School Budgeting (p. 28). SAGE Publications. Kindle Edition.</p>	<p>Utilize figure 1.1 as a guide, but feel free to apply your own ingenuity to this task.</p> <p>2-3 pages maximum.</p> <p><b>Metaphor 10 points</b></p> <p><b>Assignment due: 10/13</b></p>
<p>Week 3 10/14 – 10/20</p>	<p><b>Read Chapter 2. Culture, Data, Conflict Resolution, and Celebrating Success</b></p> <p>Sorenson, Richard D.,Goldsmith, Lloyd M.. The Principal's Guide to School Budgeting (p. 113). SAGE Publications. Kindle Edition.</p>	<p><b>Create a MINI Budget 20 points</b></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: 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> <p>2 pages maximum (20 points)</p> <p><b>Assignment due: 10/20</b></p>
<p>Week 4 10/21 – 10/27</p>	<p><b>Read Chapter 3. A Model for Integrating Vision, Planning, and Budgeting</b></p> <p>Sorenson, Richard D.,Goldsmith, Lloyd M.. The Principal's Guide to School Budgeting (p. 186). SAGE Publications. Kindle Edition.</p>	<p><b>Create GOSA Example 20 points</b></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><b>Assignment due: 10/27</b></p>
<p>Week 5 10/28 – 11/3</p>	<p><b>Read Chapter 4. Understanding the Budgeting Process</b></p> <p>Sorenson, Richard D.,Goldsmith, Lloyd M.. The Principal's Guide to School Budgeting (p. 243). SAGE Publications. Kindle Edition.</p>	<p><b>Addressing a Myth 20 points</b></p> <p>Select a “budgeting myth” from this chapter or create your own and expand upon your thoughts.</p> <p>2 pages maximum (10 points)</p> <p><b>Assignment due: 11/3</b></p>

<p>Week 6 11/4 – 11/10</p>	<p><b>Read Chapter 5. Effective, Efficient, and Essential Budgeting Practices</b></p> <p>Sorenson, Richard D.,Goldsmith, Lloyd M.. The Principal's Guide to School Budgeting (p. 332). SAGE Publications. Kindle Edition.</p>	<p><b>Conduct a Needs Assessment 20 points</b></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 pages maximum (20 points)</p> <p><b>Assignment due: 11/10</b></p>
<p>Week 7 11/11 – 11/17</p>	<p><b>Read Chapter 6. Building the School Budget</b></p> <p>Sorenson, Richard D.,Goldsmith, Lloyd M.. The Principal's Guide to School Budgeting (p. 332). SAGE Publications. Kindle Edition.</p>	<p><b>Create a Budget Calendar</b></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 pages maximum (20 points)</p> <p><b>Assignment due: 11/17</b></p>
<p>Weeks 8-10 11/18 – 12/9</p>	<p><b>Capstone Project</b></p> <p>Remember 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><b>Capstone Project</b></p> <p>Select a budgetary topic of interest and generate a budget proposal including, but not limited to these elements:</p> <ul style="list-style-type: none"> <li>A. Rationale, Data, Goals, and Outcomes</li> <li>B. Key Stakeholder Involvement and Roles</li> <li>C. Expenditure Prioritization, Cost, Funding Source(s)</li> <li>D. Formative and Summative Review Schedule</li> <li>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.</li> </ul> <p><b>Assignment due: Wednesday, 12/4</b></p>

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

### **Online Course Guidelines**

- Students should communicate with each other using common courtesy, politeness, and appropriate behaviors. Inappropriate behavior, including, but not limited to the following, are unacceptable: bullying in any form, harassment in any form, making demeaning and/or derogatory comments, other aggressive behaviors in-person or virtually and/or other forms of communication.
- Discussion Participation: You will be evaluated on the quality of your contributions and insights. Quality comments possess one or more of the following properties: Offers a response that is relevant and contributes to moving the discussion forward, transcends simply stating "I agree," and demonstrates in-depth thinking.

### **Writing Standards**

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

- Correctly apply grammar, spelling, punctuation, and sentence structures of Standard Written English.
- Develop ideas, themes, and main points coherently and concisely.
- Adopt modes and styles appropriate to their purpose and audience.
- Be clear, complete, and effective.
- 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**

Academic honesty is an essential aspect of all learning, scholarship, and research. It is one of the values regarded most highly by academic communities throughout the world. Violations of the principle of academic honesty are extremely serious and will not be tolerated.

Students are responsible for promoting academic honesty at Chaminade by not participating in any act of dishonesty and by reporting any incidence of academic dishonesty to an instructor or to a University official. Academic dishonesty may include theft of records or examinations, alteration of grades, and plagiarism, in addition to more obvious dishonesty.

Questions of academic dishonesty in a particular class are first reviewed by the instructor, who must make a report with recommendations to the Dean of the Academic Division. Punishment for academic dishonesty will be determined by the instructor and the Dean of Academic Division and may include an "F" grade for the work in question, an "F" grade for the course, suspension, or dismissal from the University.

For the most up to date information, please refer to the [Academic Honesty Policy](#) on the Chaminade University Catalog website.

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.

While AI technologies can be useful tools for research and learning, the Academic Honesty policies apply when using these technologies. The use of AI is not permitted to compose essays or produce content for assignments and exams. Students should give proper credit to sources when using information obtained through AI tools or other sources. It is essential that we uphold academic integrity while fostering a culture of creativity and critical thinking.

### **Title IX Compliance and Nondiscrimination Policy**

Chaminade University of Honolulu is committed to providing a learning, working and living environment that promotes the dignity of all people, inclusivity and mutual respect and is free of all forms of sex discrimination and gender-based violence, including sexual assault, sexual harassment, gender-based harassment, domestic violence, dating violence, and stalking. As a member of the University faculty, I am required to immediately report any incident of sex discrimination or gender-based violence to the campus Title IX Coordinator.

Chaminade University of Honolulu does not discriminate on the basis of sex and prohibits sex discrimination in any education program or activity that it operates, as required by Title IX and its regulations, including in admission and employment. Inquiries about Title IX may be referred to the University's Title IX Coordinator, the U.S. Department of Education's Office for Civil Rights, or both and contact information may be found at the [Chaminade University Title IX Office Contact Information and Confidential Resources website](#).

The University's Nondiscrimination Policy and Grievance Procedures can be located on the University webpage at: <https://chaminade.edu/compliance/title-ix-nondiscrimination-policies-procedures/>

To report information about conduct that may constitute sex discrimination or make a complaint of sex discrimination under Title IX, please refer to the [Campus Incident Report form](#). Chaminade University of Honolulu prohibits sex discrimination in any education program or activity that it operates. The NOTICE of NONDISCRIMINATION can be found here: [Notice of Nondiscrimination](#).

### **Disability Access**

Chaminade University of Honolulu offers accommodations for all actively enrolled students with disabilities in compliance with Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act (ADA) of 1990, and the ADA Amendments Act (2008).

Students are responsible for contacting Kokua Ike: Center for Student Learning to schedule an appointment. Verification of their disability will be requested through appropriate documentation and once received it will take up to approximately 2–3 weeks to review them. Appropriate paperwork will be completed by the student before notification will be sent out to their instructors. Accommodation paperwork will not be automatically sent out to instructors each semester, as the student is responsible to notify Kokua Ike via email at [ada@chaminade.edu](mailto:ada@chaminade.edu) each semester if changes or notifications are needed.

### **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.