The Florida Agricultural and Mechanical University  
College of Education  
Tallahassee, Florida 32307

Course Outline

<table>
<thead>
<tr>
<th>Course Number</th>
<th>Course Title</th>
<th>Credits</th>
<th>Clock Hours Per Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDA 5201</td>
<td>SCHOOL BUSINESS MANAGEMENT</td>
<td>3</td>
<td>Lecture 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Laboratory</td>
</tr>
</tbody>
</table>

Department: **Educational Leadership and Human Services**  
Prerequisites: **Graduate status**

Students must have Internet access, [Taskstream Electronic Portfolio](#) and participate on Blackboard. Additional Resources: Login [access to the Cecil Golden website](#)

**Faculty Name:** Dr. O. Dozier-Henry  
203B-GECB College of Education  
**Term and Year:** Spring 2010  
** TASKSTREAM Self Enrollment Code:** 2NKTHP

<table>
<thead>
<tr>
<th>Office Hours (Others by Appt.)</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n/a</td>
<td>4:00-5:30</td>
<td>By appt.</td>
<td>By appt.</td>
<td>1-4</td>
<td>noon – 2:30</td>
</tr>
<tr>
<td>Office Telephone:</td>
<td>412-7048</td>
<td>Preferred:1-850-677-0167</td>
<td></td>
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</table>

**COURSE DESCRIPTION**

**EDA 5201 School Business Management** (3) Essential knowledge and skills related to principles of finance and business management, budgetary practices, office management, and financial accounting and reporting.

**OVERALL GOALS FOR THE COURSE**

The course is designed to use the systems approach to school administration, supervision, management and educational leadership in order to assure the students possess those competencies recommended by the Florida School Leader Standards, the COE conceptual framework and Standards for Advanced Programs in Educational Leadership. Powerful external forces have altered the nature of school business administration. The previous distinction between business vs. instruction has evolved into a recognition of the synergy between them. The course locates the contemporary business administrator’s role within the system as a key support, not the essential focus of the system’s organization. Content knowledge and skills related to principles of school funding and finance; procurement, effective business management; budgeting practices; personnel and office management; plant maintenance and construction, management information systems and school-community relations are explored.
The Conceptual Framework in the Professional Education Unit at Florida A&M’s University College of Education is an integrated approach to providing educational experiences that result in exemplary professional educators. The Framework is comprised of several activities and themes with the mission of developing high quality classroom teachers, administrators and support personnel. The term “exemplary” refers to the kind of graduates the unit strives to produce. The Framework is comprised of six themes with the mission of developing high quality classroom teachers, administrators and support personnel. The term “exemplary” refers to the kind of graduates the PEU strives to produce. The figure below provides a diagram of the Exemplary Professional Conceptual Framework. The Educational Leadership Program has identified the professional content and experiences of the Educator Accomplished Practices specified by the Florida Standards Commission, the Florida Essential Teaching Competencies identified by the Florida Department of Education, the competencies and domains identified by the Florida Council for Educational Management and the standards identified by the National Council for the Accreditation of Teacher Education. Figure 1 provides a diagram of the Exemplary Professional Conceptual Framework.
### COMPETENCIES AND SKILLS ADDRESSED DURING THE COURSE

**STANDARDS CROSSWALK**

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Behavioral Objectives</th>
<th>FELS</th>
<th>FELE Subtest</th>
<th>Conceptual Framework</th>
<th>ELCC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Experience/SBM interviews</td>
<td>1-9</td>
<td>7.0</td>
<td>1</td>
<td>CF 2.1—2.7 (S,K)</td>
<td>3.1c,3.2c;3.3a,c</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>14;3-12</td>
<td>13.1</td>
<td>4.2a,5.2a</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>2</td>
<td></td>
<td>5.3a</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>6d</td>
</tr>
<tr>
<td>Power Point presentation</td>
<td>1,2,8,9,10</td>
<td>7.0</td>
<td>1,2,5,10</td>
<td>CF 4.4 (K) 4.5(S) 5.6(S) 5.7(K)</td>
<td>2.2c 6d</td>
</tr>
<tr>
<td>Short paper</td>
<td>4,6,8,9</td>
<td>7.0</td>
<td>1.1,1.6,1.11,1.13</td>
<td>CF 2.1-2.7 4.5(S),5.1(K)</td>
<td>2.3c;4.2b</td>
</tr>
<tr>
<td>Objective tests/ Midterm/ quizzes</td>
<td>1,3,5,6,8,9,10</td>
<td>3.2,8,4.5-4.9 5.1-5.5</td>
<td>1 1.1,4.2-5 2 13.1-2 14.4</td>
<td>CF 5.1 (S) 5.7 (S,D)</td>
<td>6.1b,d,h</td>
</tr>
<tr>
<td>Blackboard Usage and Discussion</td>
<td>1,3,5,6,8,9,10</td>
<td>3.2,8,4.5-4.9 5.1-5.5</td>
<td>1 1.1,4.2-5 2 13.1-2 14.4</td>
<td>CF 5.1 (S) 5.7 (S,D)</td>
<td>1.4a d2.3c 3.1b</td>
</tr>
<tr>
<td>Board participation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Final Budget exam</td>
<td>2,3,4,5,7,10</td>
<td>3.2,8,4.5-4.9 5.1-5.5</td>
<td>1 1.1,4.2-5,14.1 2 13.1,2;14.4</td>
<td>CF 2.1—2.7 (S,K) 4.5(S),5.1(K) 5.7</td>
<td>1.1a;1.5a; 3.1c 3.2c;3.3a;4.1d;5.1-3a 6.3b,c</td>
</tr>
</tbody>
</table>

*Pertinent state and national standards are contained in the Standards crosswalk.*
**SPECIFIC BEHAVIORAL OBJECTIVES**

The Exemplary Professional will:

1. identify emergent forces changing the way 21st century school business management (SBM) is conceptualized.
2. analyze the processes of planning, developing, implementing, and evaluating a district budget.
3. delineate key aspects of Florida’s funding plan for public elementary and secondary schools.
4. become conversant with the contexts relevant to SBM: constitutional, statutory and political; resource and financial; management and systems; and the information systems.
5. utilize knowledge of the process of financial accounting, auditing, and reporting.
6. utilize data to validate, order, analyze and interpret findings that impact policy.
7. engage in a mock strategic planning process and SWOT analysis.
8. demonstrate improved mastery of time and professional disposition.
9. match Florida leadership competencies to the tasks of SBM.
10. be conversant with the glossary of professional terms (jargon) associated with SBM.

**TOPICAL OUTLINE & ASSIGNMENTS**

EDA 5201 - Dr. O. Dozier-Henry

(The proposed schedule is subject to change due to guest availability, faculty travel and/or extenuating circumstances.)

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Session Two: Jan.19,2010</td>
<td>Textbook quiz; Success strategies; Budgeting &amp; financial markets self-assessment; Tasks of the school business manager; Planning as Strategy and Process. An Alternative View of Educational Planning. Read chapters 2 &amp; 3 in the text; complete Pre-assessment online; do time management &amp; personal budget exercises. Develop a revised monthly budget that is reduced by 20%.</td>
</tr>
<tr>
<td>Session Three: Jan.26,2010</td>
<td>Reintroductions; calendar alignment, Quiz, Glossary management; study buddy teams; the legislative and judicial context for school business management; the management concept; public vs. private sector management issues; revenue &amp; fiscal context;</td>
</tr>
<tr>
<td>Session Four: Feb.2,2010</td>
<td>Introduction to the vocabulary of finance and management, the changing role of the school business manager, site based management; Review of chapters 2,3 &amp; personal budgets; student study teams; Complete Pre-assessment online segment; do time/money management exercises; Take the challenge at <a href="http://www.financialfitnesschallenge.ca/en/village/">http://www.financialfitnesschallenge.ca/en/village/</a> Print out your score/answers and turn in to next class (2-9-10)</td>
</tr>
<tr>
<td>Session Five Feb.9,2010</td>
<td>Online Quiz. Review assigned Power Points Statutory Bases for School System Budgeting, topic selection Read chapters 4 &amp; 5. Draft formal letters requesting an interview with a school bookkeeper and with a budget official at the Florida DOE.</td>
</tr>
<tr>
<td>Session Six</td>
<td>Strategic Planning and Budgeting. The Budget Process, Concepts of Budgeting Development Suited to Present and Future Educational Systems. Site-Based</td>
</tr>
<tr>
<td>Date</td>
<td>Topic</td>
</tr>
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<td>---------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Feb.16.2010</td>
<td>Budgeting. Evolution of the Planning, Programming, Budgeting, Evaluation System. Zero-Based Budgeting.</td>
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<tr>
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<td><strong>Session Seven:</strong> Feb.23,2010</td>
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<td></td>
<td><strong>Session Eight:</strong> March 2, 2010</td>
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<tr>
<td></td>
<td><strong>Session Nine:</strong> March 16,2010</td>
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<tr>
<td></td>
<td><strong>Session Fourteen:</strong> April 20,2010</td>
</tr>
<tr>
<td></td>
<td><strong>Session Fifteen:</strong> April 27, 2010</td>
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</tbody>
</table>
TEACHING METHODS, ACTIVITIES etc.

The methods utilized in this course will include, but are not limited to:

- lecture/discussion
- Power Point presentations
- videotape(s) and other instructional media
- Excel Spreadsheets associated with SBM
- interviews and guest presenters
- simulations /case studies
- Blackboard, Taskstream and online activities

The classroom is an academic environment that promotes learning and growth. Differences of viewpoints or concerns are to be expressed in terms which are supportive of the learning process. Student conduct which disrupts the learning process will not be tolerated and may prompt disciplinary action and/or removal from class. In short, respect the rights of others! Academic dishonesty will neither be tolerated. This means any and all actions by a student intended to gain an unearned academic advantage by fraudulent means. Plagiarism consists of the misuse of published and or unpublished works of others (including Internet websites) by claiming credit for what is not yours. Students are advised that software now exists that identifies original sources. When in doubt, give up the credit!

Late assignments, if accepted, will be penalized one letter grade.

Quizzes- Students must take all quizzes. Make-up quizzes will be given only if extenuating circumstances (illness, death in the family) can be documented. It is the student’s responsibility to provide documentation within one week of the absence. Make-up quizzes are given during the Final Examination period at the end of the semester.

Grading/Assignments Evaluation in the course will be based on professional attitude, competence in the language arts, attendance, class participation, written and oral assignments, readings, examinations, and projects. The quality of the work you submit in consideration of a grade counts.

Grades are determined by the quality of student performance. Selected artifacts are to be uploaded to Taskstream.

Grading Scale: A=90-100, B=80-89, C=70-79, D=60-69, F=Below 60

Favorable performance is exemplified in activity(ies), product(s), response(s) that exceed or meet established criteria, which demonstrates candidates’ acquisition of knowledge, skills, and dispositions relative to institutional, national, state, and program standards. A favorable performance designation is assigned to products, which demonstrate a significant presence of (a) higher order thinking skills, analysis, synthesis, and evaluation, (b) mastery of a specific writing style, American Psychological Association, (c) continuity of ideas within paragraphs, (d) appropriate grammatical construction, spelling, punctuation, and word selection, (e) creativity, and (f) a significant understanding and use of theory and blending of theory with practice. Products
meeting these criteria will be determined as “A” products and assigned a numerical score in the range of 90-100.

**Acceptable** performance is exemplified in activity(ies), product(s), response(s) that approach or approximate established criteria, which demonstrate candidates’ acquisition of knowledge, skills, and dispositions relative to institutional, national, state, and program standards, but does not meet the criteria for favorable designation. An Acceptable performance designation is assigned to products, which demonstrate vague attempts at including (a) higher order thinking skills, analysis, synthesis, and evaluation, (b) mastery of a specific writing style, American Psychological Association, (c) continuity of ideas within paragraphs, (d) appropriate grammatical construction, spelling, punctuation, and word selection, (e) creativity, and (f) a significant understanding and use of theory and blending of theory with practice. Products meeting these criteria will be determined as “B” products and assigned a numerical score in the range of 80-89.

**Marginal** performance is exemplified in activity(ies), product(s), response(s) that do not exceed, meet, or approach or proximate established criteria, which demonstrate candidates’ acquisition of knowledge, skills, and dispositions relative to institutional, national, state, and program standards. A Marginal performance designation is assigned to products, which demonstrate minimal inclusion of (a) higher order thinking skills, analysis, synthesis, and evaluation, (b) mastery of a specific writing style, American Psychological Association, (c) continuity of ideas within paragraphs, (d) appropriate grammatical construction, spelling, punctuation, and word selection, (e) creativity, and (f) a significant understanding and use of theory and blending of theory with practice. Products meeting these criteria will be determined as “C” products and assigned a numerical score in the range of 70-79.

**Unacceptable** performance is exemplified in activity(ies), product(s), response(s) that do not exceed, meet, or approach or proximate established criteria, which demonstrate candidates’ acquisition of knowledge, skills, and dispositions relative to institutional, national, state, and program standards. An Unacceptable performance designation is assigned to products, which demonstrate a lack of (a) higher order thinking skills, analysis, synthesis, and evaluation, (b) mastery of a specific writing style, American Psychological Association, (c) continuity of ideas within paragraphs, (d) appropriate grammatical construction, spelling, punctuation, and word selection, (e) creativity, and (f) a significant understanding and use of theory and blending of theory with practice. Products meeting these criteria will be determined as “U” products and assigned a numerical score in the range of 60-69.

**Course Policies**

**Dispositions** As a component of student assessment, the College of Education has instituted a system for monitoring the professional dispositions: Professionalism, Effective Communication, Respectful Behavior, Ethical Behavior, and Reflective Behavior. At the end of each semester each instructor will fill out an assessment instrument for each student which will be turned in to the department chair and kept in the student’s file. If a problem arises during the semester, a disposition feedback form may be completed by an instructor or school personnel and turned in to the student’s department chair. The severity of the behavioral deficiency will influence the chairperson’s handling of the situation. (See Assessment Instrument for Dispositions and Disposition Feedback Form on syllabus pages 21-22 for more detailed information. This policy includes provisions for professional dress, attendance, punctuality, use of cell phones, etc.).
**Academic Honor Policy** The University’s Academic Honor Policy is located in the FANG Student Handbook, under the Student Code of Conduct - Regulation 2.012 section, beginning on page 55-56.

**Policy Statement on Non-Discrimination** It is the policy of Florida Agricultural and Mechanical University to assure that each member of the University community be permitted to work or attend classes in an environment free from any form of discrimination including race, religion, color, age, disability, sex, marital status, national origin, veteran status and sexual harassment as prohibited by state and federal statutes. This shall include applicants for admission to the University and employment.

**SPECIAL NEEDS AND ACCOMMODATIONS**

* ADA Compliance Policy: Students with disabilities needing academic accommodations should register with and provide documentation to the Student Disability Resource Center and bring a letter to the instructor indicating the need for accommodation and what type. This should be done prior to the second week of class.

**CRITERIA FOR EVALUATION OF STUDENT PERFORMANCE**

Each student is required to complete the reading assignments in the text and any supplementary readings prior to the class session. Familiarity with the material will increase learning in the classroom. The exceptional (A) student comes prepared with insights and questions. Significant contributions to class discussions are highly valued.

**Students are expected to keep a disk (flash drive or CD-rom) with all work.** The professor will notify students when to upload materials in TaskStream. All report writing must comply with APA style guidelines.

The final (cumulative) course grade will be computed as a weighted combination of (a) class participation and assignments (b)midterm exam, (c) short paper, (d) field experience interviews, (e) Blackboard participation and (f) the final budget examination. **The use of the TaskStream electronic portfolio is mandatory.** The indicated course artifacts must be uploaded to the portfolio or no final grade will be recorded for the student. The assigned weights are:

**Grading System (cumulative)**

<table>
<thead>
<tr>
<th>Grade</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>901 - 1000 points</td>
</tr>
<tr>
<td>B</td>
<td>800 - 900</td>
</tr>
<tr>
<td>C</td>
<td>700 - 799</td>
</tr>
<tr>
<td>F</td>
<td>Below 700</td>
</tr>
<tr>
<td>I</td>
<td>Incomplete grades are rarely given and are subject to the guidelines provided in the current FAMU Bulletin.</td>
</tr>
</tbody>
</table>

1. **Punctuality with Assignments/Attendance.** Assignments are done according to specifications and are submitted in advance (extra credit) or on time with a professional
appearance. **Late work is unlikely to be accepted barring a documentable emergency.**

**ALL** assignments will be posted to the Blackboard digital dropbox. Particular, identified assignments must also be posted to the Taskstream portfolio. Both systems indicate the exact time an assignment is posted. Get your work in early! Punctuality also refers to the student who arrives for class early, or on time, with the required materials. All appropriate assignments and corrected work in Taskstream are due in the digital dropbox by the date of the final exam. *(100 points)*

2. **Classroom Assignments and Participation.** Students are expected to read all assigned materials, come to class prepared to discuss them and participate in simulations and other class activities. Students are expected to complete all assignments: in-class, online and those assigned as homework. By the second class session, each student is responsible for providing the professor with a tabbed manila folder with his/her name typed in bold letters to hold all work. Students are also required to create a separate disk to hold copies of all work. Attendance is mandatory and enhances one’s grades. Successful log in during online sessions also counts as attendance. Similarly, unexcused absences lower one’s grades. **Previously submitted assignments to any other course are not acceptable without advance approval of the professor and constitute a form of plagiarism.** Missed quizzes cannot be made up. A missed exam will have to be taken during finals week. Per University policy, **three (3) unexcused absences require that the student fail the course.** *(100 points)*

3. **Field Experience.** Field experience responses and reflections are to be uploaded to the TaskStream portfolio. **200 points total**
   a. **Students are expected to interview a school business manager** in the state of Florida. The interview may be conducted face-to-face, by phone or via online interview. *(100 points).*

   b. **Students must arrange to shadow a building level administrator with school business management/ accounting responsibilities.** This should consist of a minimum of 2 hours. The intent is to observe fiscal procedures and local policies that govern purchasing for the school year. Details will be posted on Blackboard Course Assignments. *(100 points)*

4. Students will prepare a **Power Point presentation** (10 slide minimum) to be posted on Blackboard by the fifth class session. The topic will be assigned by the professor and be related to the short paper. Use the text when appropriate as a resource. Give vivid examples and suggest resources that may be used to extend understanding. *(50 points)*

5. **Short paper** _(to be uploaded to the TaskStream portfolio). 100 points._ Frequently during online sessions, students will have a timed exercise where they
must get through the items of an in-basket or respond to a case study. These responses must go to Blackboard digital dropbox.

6. **Midterm (100) quizzes (50 points) totaling 150 points**
   Exams are cumulative and may test any material covered over the entire semester. Quizzes are quick assessments of knowledge retention and application. They may occur either in class or online.

7. **Final take home exam / Budget project (250 points)**
   This exam extends the scenarios and case studies worked on throughout the semester.

8. **Blackboard Usage and Discussion Board participation (50 points)**
   This is curved with the full 50 points going to the student with the most usage and then adjusted downward.

**Total 100% or 1000 points possible**

There are intermittent extra credit opportunities offered throughout the course. Typically these are announced in class and due the following week via the digital dropbox.

University graduate policy permits one unexcused absence. The second unexcused absence mandates that the student fail the course. Avoid this situation by documenting absences and communicating with the professor. Note that two tardy arrivals constitutes one unexcused absence.

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**The Digital Dropbox/Taskstream**

The digital dropbox is the sector on Blackboard where **all** assignments go. You are able to keep up with your submissions by periodically printing your listing of submitted assignments. You will be directed in class when to submit this printout. Certain assignments will be taken up via hard copy. All work is also to be saved to disk. (CD-roms are better these days as newer computers do not service floppies) to back up your work.

The Taskstream electronic portfolio tracks your progression through the courses via your adherence to identified state and program standards. Grading of these assignments and activities are done via the electronic portfolio. Use the self-enrollment code to enroll.

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**SHORT PAPER**

The student will choose a topical area and write a short paper about the topic. The paper will be approximately 9-11 pages in length using APA style format (6th edition). For those needing a refresher, visit [http://owl.english.purdue.edu/workshops/hypertext/ResearchW/genre.html](http://owl.english.purdue.edu/workshops/hypertext/ResearchW/genre.html) and make an appointment to see the professor **early**.

*Suggested Topics*

- Investment Instruments for School Systems  
  Ron Edmonds: MIA in School Literature
- Vouchers: Destroyers of Public Schools?  
  Utility of Demings’ Principles for the SBM

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The Role of the SBM in Collective Bargaining    School Finance Litigation: Equity yet?
Risk Management Issues

You may choose another pending the prof’s approval.

This must be approved by 2/26/10. The paper is due April 13

The Final Budget Exam Project

The exam will emerge from scenarios worked on in class. It counts for 25% of your grade. For help with Excel help-visit http://www.usd.edu/trio/tut/excel/35.html. Use the library assignment time to perfect your use of Excel. The exam must be submitted in a tabbed separate binder with all of the requisite components. You also submit the spreadsheet with the numbers and Word attachments to the digital dropbox. Appendices should be in the notebook only. However, back up everything on your personal disk (CD or flash drive). See page 15/

STUDENT EXPECTATIONS

Students are encouraged to study and work together as much as possible throughout the course (e.g., preparing for exams). However, all exams and exercises, unless otherwise specified, are to be completed individually.

You will be responsible for:

✓ timely arrival to class. If you must be late, wait until an acceptable time to enter and never interrupt or walk in front of a speaker.

✓ being prepared to discuss readings and topics of relevance with the class. If you have not done the readings and are not prepared to contribute to class discussion, please do not expect a stellar review in terms of your participation grade.

✓ notifying me in advance (when possible) of an excused or expected absence, expected tardiness, or having to leave class early.

✓ obtaining notes, assignments, or changes to assignments in the unlikely event class is missed. This should be done prior to the next class meeting.

✓ providing documentation for any absence for which you wish to be excused

✓ monitoring your progress in the course. Early intervention is the best method of solving a problem – crisis management is not. Contact me as soon as you feel you are having a problem of any kind. I will do everything in my power to help you, but please keep in mind that “a lack of planning or action on your part does not constitute an emergency on mine.”

✓ modeling good citizenship. Courtesy is expected. This means not “hogging” center stage, no audible cell phones or in class responses, and encouraging others to offer ideas. Completion of activities is also your responsibility.

✓ completing and submitting all deliverables on or before the due date.

✓ The assignments that must be loaded to TaskStream include your school business manager interview documents, short paper and budget exam. No grade will be submitted if you do not maintain your Taskstream portfolio and include these documents.
5201 PAPER TEMPLATE

Please use the template below to develop your short paper for EDA 5201. Aim for rich description rather than brevity. Submit to dropbox by due date and bring a hard copy to the next class. Address these issues in your paper as well as additional pertinent areas that explain and illuminate the topic covered. You may address the items in order; however DO NOT simply list each question and provide an answer. Weave the answers into your extended essay.

Name______________________________ Date: __________

1. Title of Article in APA format

2. Indicate what influenced you to read about this particular topic.

3. Summarize the articles retrieved that support your point of view about the topic emphasizing article intent, research questions and outcomes if applicable and recommendations.

4. Summarize the articles retrieved that support your point of view about the topic emphasizing article intent, research questions and outcomes if applicable and recommendations.

5. What do you know about the major authors who contribute to this field? (i.e. degrees, background, accomplishments, related articles in this field)

6. As a result of researching this topic, what are the policy implications of your findings?

7. How does this article address the above area of need?

7. Based on what you’ve learned this semester about yourself and the terrain of school business management, what areas need further development?

8. What did you personally learn from this assignment? How will you use it?
## 5201 Interview Protocols

<table>
<thead>
<tr>
<th>Identification of a suitable administrator to interview on the macro business level</th>
<th>Superior Achievement</th>
<th>Average and Acceptable Achievement</th>
<th>Marginal Achievement</th>
<th>Unacceptable, does not meet criteria</th>
<th>Score/Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>The student researches and approaches via letter and/or email an appropriate administrator fulfilling the school business manager role at a district or macro level (i.e. in charge of elementary, middle or high schools). The student provides the administrator with a resume and/or evidence of the intent of the assignment.</td>
<td>The student makes contact with an administrator but does so informally (i.e. “dropping by” the interviewee’s office without a letter of follow up.</td>
<td>The student procrastinates and does not choose an appropriate administrator.</td>
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<tr>
<td>Arrangement of a mutually convenient time to meet and Documents the meeting time via email after arranging a time to meet either on the phone, via email or in person.</td>
<td>The student arranges a mutually convenient meeting time and place with the designated administrator by phone.</td>
<td>The student does not follow up with the administrator to determine a suitable meeting time.</td>
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<tr>
<td>Development of Interview protocol The student goes beyond the commonly developed questions and inserts several of his/her own.</td>
<td>The student works in tandem with classmates to identify at least 5-10 common questions to pursue in the interview.</td>
<td>The student does not predetermine specific questions to be asked.</td>
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<tr>
<td>Interview Execution The student arrives at the interview early or on time, introduces self via a resume’ and the documented</td>
<td>The student is timely and introduces self to interviewee in a professional manner. The student spends</td>
<td>The student is not timely and is unprepared to ask predetermined questions. The student does not present self as a</td>
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</tbody>
</table>
assignment and requests aid from the administrator. The student spends at least an hour with the interviewee. close to an hour with the interviewee. than 45 minutes. professional.

**Interview Summary**

The student narrates information about the interviewee, the setting and process of the interview. Responses to pertinent questions are offered with a connection to the course content.

The student narrates the setting and process of the interview. The student indicates the questions asked and the interviewee's responses. An effort is made to connect responses to the course content.

The student submits a list of the scripted questions and their answers.

The student neglects to summarize the interview in the assignment required.
SCHOOL BUSINESS MANAGEMENT BUDGET EXAM  
GRADING MATRIX

5201 Budget Exam Grading Matrix

<table>
<thead>
<tr>
<th>Score/Level</th>
<th>unachieved, poor command</th>
<th>marginal execution</th>
<th>average execution</th>
<th>well done execution</th>
<th>outstanding execution</th>
</tr>
</thead>
</table>

1. The exam is laid out on a spreadsheet program.

2. The baseline figures are based on accurate data given in class.

3. In-kind categories are separated, correct and clearly identified.

4. The exam has a cover letter to an appropriate district official constructed without grammatical errors.

5. The cover letter summarizes the budget.

6. Tabs are present, clearly labeled and easy to follow

7. Categories are described on the spreadsheet.

8. The budget narrative offers sufficient detail (explanation) for each line item listed; arithmetic shows how the figure was arrived at.

9. Budget figures reflect current prices and are reasonably assigned.

10. No major category is excluded from the budget.

11. The arithmetic is correct in each subsection.

12. All funds are accounted for with no surplus.
13. Function and object codes are used appropriately.
14. Spending in no category appears to be frivolous or unjustified.
15. Revenue and expenditures are separate and delineated.
16. Relevant appendices are included and properly labeled.
17. The exam was submitted electronically by the deadline.
18. The exam is presented neatly in a bound folder or notebook.
19. The contents and layout of the materials are well organized.
20. The budget addresses the contingencies listed.
21. There is evidence of research to obtain figures used.
22. The tabbed notebook was received on or ahead of the deadline.
23. The budget refers the reader to supportive data in the appropriate appendix.
24. The budget clearly identifies materials and services for special populations.
25. Color and graphics highlight important details of the budget.
REFERENCES, SUPPLEMENTAL MATERIALS, AND STUDENT SUPPORT AVAILABLE


**Websites and online resources**

www.motleyfool.com
http://www.finplan.com/finance/finstate.asp
http://www.finplan.com/finance/networth.asp
http://www.finplan.com/finance/payoff.asp
http://www.google.com/Top/Home/Personal_Finance/
http://www.handsonbanking.org/
http://www.personal-budget-planning-saving-money.com/
http://www.google.com/google-d-s/b1.html
http://www.financialfitnesschallenge.ca/en/village/
http://www.msfinaancialsavvy.com/archive/index.php
http://www.recordkeeper.com/
http://www.fileflash.com/allfiles/time_management/
### FELE COMPETENCIES FOR SCHOOL FINANCE

<table>
<thead>
<tr>
<th>COMPETENCIES</th>
<th>SKILLS</th>
</tr>
</thead>
</table>
| A. Knowledge of Florida’s funding plan for public elementary and secondary schools. | 1. Identify the major funding components of the total state school finance program.  
2. Identify, interpret, and apply each of the formula factors used in computing the state and local Florida Education Finance Program allocations.  
3. Identify the requirements for school district participation in the Florida Education Finance Program.  
4. Demonstrate knowledge of the adequacy and equity of the Florida Education Finance Program regarding children and taxpayers. |
| B. Ability to analyze the processes of planning, developing, implementing, and evaluating a district budget. | 1. Identify the major funds of a school district’s budget.  
2. Identify the major categories of financial resources available to a district beyond the state allocation.  
3. Identify the interrelationship between the individual school budget and the school district budget.  
4. Interpret and use the factors that cause change in the school operating budget.  
5. Identify the purpose of a budget.  
6. Demonstrate knowledge of the purpose of school internal funds and the proper accounting of those funds. |
| C. Knowledge and application of school finance concepts. | 1. Demonstrate knowledge of and makes inferences concerning model school finance plans of other states.  
2. Demonstrate knowledge of and discriminates among measures of school district fiscal capacity.  
3. Identify measures of educational resource need.  
4. Identify major sources and characteristics of taxation used to support public education.  
5. Demonstrate knowledge of equity concepts tested in major school finance litigation.  
6. Identify, interpret, classify, and make inferences concerning the contributions of education to the economy. |
| D. Knowledge of the process of financial accounting, auditing, and reporting. | 1. Identify methods of cost attribution.  
2. Identify and discriminate among the practices, standards, and procedures of accounts used in school internal audits.  
3. Discriminate among components of the accounting classification structure used by Florida school districts.  
4. Identify and differentiate among practices and procedures of fiscal control and accountability of school-based funds. |
| E. Knowledge of the precedence and purposes for funding public elementary and secondary education. | 1. Identify federal, state and local historical development in public school funding.  
2. Distinguish among federal, state, and local purposes in the funding of public schools.  
3. Identify current trends of school finance in Florida. |
### RELATED FELE COMPETENCIES FOR COMMUNICATION SKILLS

<table>
<thead>
<tr>
<th>Category</th>
<th>Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. Knowledge of the communication process</strong></td>
<td>1. Recognize or state the purpose of a particular communication task.</td>
</tr>
<tr>
<td></td>
<td>2. Identify techniques for building rapport.</td>
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<tr>
<td></td>
<td>3. Identify effective oral communication skills.</td>
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<tr>
<td></td>
<td>4. Select techniques for developing and enhancing effective communication.</td>
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<td>5. Recognizes the impact of nonverbal communication</td>
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<td>6. Identify optimal communication conditions.</td>
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<td></td>
<td>7. Identify probable reactions to the form and content of communication.</td>
</tr>
<tr>
<td><strong>E. Knowledge of a variety of communication techniques</strong></td>
<td>1. Identify the appropriate use of technology in the communication process</td>
</tr>
<tr>
<td></td>
<td>2. Select media appropriate to a given situation</td>
</tr>
<tr>
<td></td>
<td>3. Select methods appropriate to a given situation</td>
</tr>
<tr>
<td><strong>G. Ability to write effectively on a topic</strong></td>
<td>1. Demonstrate a sense of purpose</td>
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<td></td>
<td>2. Write in a logical, clear style.</td>
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<td></td>
<td>3. Use appropriate grammar and sentence structure.</td>
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<td></td>
<td>4. Use language appropriate for the topic and reader.</td>
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<td></td>
<td>5. Correctly apply mechanics of writing: spelling, capitalization, and</td>
</tr>
<tr>
<td></td>
<td>punctuation.</td>
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<td></td>
<td>6. Organize written material effectively</td>
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<td></td>
<td>7. Use standard English in written communication.</td>
</tr>
</tbody>
</table>
### Advanced Level Disposition Form

**Candidate’s Name:** ___________________  **Student ID:** ____________  **Program Area:** __________________

<table>
<thead>
<tr>
<th>Criteria for rating</th>
<th>Favorable</th>
<th>Acceptable</th>
<th>Marginal</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>The candidate</td>
<td>(90–100 %)</td>
<td>(89-80%)</td>
<td>(79-70%)</td>
<td>(60-69%)</td>
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<td>demonstrates</td>
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<td>indicators of</td>
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<tr>
<td>performance</td>
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</tbody>
</table>

**Professional Behavior : The Other Professional Educator Candidate demonstrates professional behavior** (Please use a ✓ to indicate level of performance.)

- is punctual and regularly attends class.
- has a positive disposition (possesses congenial interpersonal skills; is patient, resilient, optimistic and approachable).
- presents oneself in a professional manner both in demeanor and appearance.
- handles feelings appropriately (emotional management).
- maintains integrity and high professional standards.
- works in a reliable, dependable manner, utilizing initiative.
- seeks opportunities for professional development and actively participates in professional organizations.
- demonstrates the appropriate use of personal technology during class.
- demonstrates academic honesty.

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<td>performance</td>
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</tbody>
</table>

**Effective Communication: The Other Professional Educator Candidate demonstrates effective communication skills** (Please use a ✓ to indicate level of performance.)

- communicates effectively in a professional manner using standard English language and appropriate tone for the situation.
- is highly sensitive to what to do or say in order to maintain good relations with others and acts accordingly.
- is willing to share information and ideas in a mutually respectful manner.
- utilizes and models active listening and appropriate feedback skills.
### Criteria for rating

<table>
<thead>
<tr>
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<th>Acceptable</th>
<th>Marginal</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>The candidate consistently and thoroughly demonstrates indicators of performance. (90–100%)</td>
<td>The candidate usually and extensively demonstrates indicators of performance. (89-80%)</td>
<td>The candidate sometimes and adequately demonstrates indicators of performance. (79-70%)</td>
<td>The candidate rarely or never and inappropriately or superficially demonstrates indicators of performance. (60-69%)</td>
</tr>
</tbody>
</table>

### Professional Practice: The Other Professional Educator Candidate demonstrates professional practice (Please use a ✓ to indicate level of performance.)

- is curious, willing to experiment with new ideas and techniques, and is receptive to change.
- analyzes and evaluates concepts and clinical practices.
- experiments, evaluates, and initiates innovative practices.
- demonstrates a willingness to review and analyze research and/or conduct research on his/her own.
- recognizes the individual differences that distinguish his/her students from one another and takes into account these differences in behavior of students.
- is respectful, tolerant, and responsive to the cultural and family differences, including special needs, which students and colleagues bring to the learning environment.
- continually deepens knowledge of practice and student learning.
- understands the roles of assessment, including the roles of standards and outcomes in assessment.

<table>
<thead>
<tr>
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</tr>
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<tr>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>The candidate consistently and thoroughly demonstrates systematic thinking</td>
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</tbody>
</table>

### Systematic Thinking: The Other Professional Educator Candidate demonstrates systematic thinking (Please use a ✓ to indicate level of performance.)

- critically examines his/her practice on a regular basis to deepen knowledge, expand his/her repertoire of skills, and incorporate findings into practice.
- thinks critically before responding to unforeseen circumstances and modifies his/her actions as a result.
- thinks critically about how to best manage, apply, and integrate technology into his/her everyday practice.
- conducts self assessment through reflection in problem solving.
# SELECTED CONCEPTS, PRINCIPLES, AND PEOPLE DISCUSSED IN THE COURSE

Concepts of financing public schools
- flat grants
- foundation grants
- horizontal equity
- vertical equity
- adequacy
- supply and demand
- elasticity
- progressive and regressive taxes

Legal Issues and litigations for funding for funding public schools
- Standard of Fiscal Neutrality
- Serrano v. Priest
- McInnis v. Shapiro
- San Antonio Independent School District v. Rodriguez
- Rose v. Independent Council for Better Education

Principles of the FEFP (Florida Education Finance Program)
- statutory authority
- requirements for school participation
- equalization formulas
- minimum efforts of taxation and millage rates

Knowledge of sources of school funding (federal, state, local support)

Budgeting
- state forecast and appropriation

Financial system and program cost accounting for Florida
- funds or account Groups
- codification

Principles of accounting
- fiscal management and cycle of accounting
- accounting formula (relationship between assets, liability and expenditures)
- fund equity vs. owner equity
- internal and external auditing procedures

Budgeting and fiscal accountability
- macro and micro planning systems
- budgetary cycle and documentation

Techniques (Zero-based Budgeting, Incremental Budgeting, PPBES (Planning, Programming, Budgeting, and Evaluation System))