FITCHBURG STATE UNIVERSITY

Please submit the typed original with all required signatures to the Graduate Council
Course syllabus must be attached and completed according to Fitchburg State guidelines

Form functionality most compatible using Adobe Acrobat 9 and newer.

Course Title: Managing Human Resources and Budget Development

Banner limit of 30 characters, including punctuation, spaces, and special characters.

Banner Abbreviation: | H | R | | a | n | d | | B | u | d | g | e | t | | D | e | v | e | l | o | p | m | e | n | t | | | | |

Faculty member(s) who
are creating the course:

Contact Person: Janna Heiligenstein   Graduate Program Proposing Change: EDLM-Education

Course Description:
The focus of this course is two-fold: 1) establishing the rationale and organizational structure that support effective human resource management; and 2) addressing the fiscal and allocated functions of school administration. Topics include but are not limited to the selection of staff, budgeting, teacher induction, financing at the local, state, and federal level, tenure, promotion and dismissal, contracts, compensation and benefits administration, policy making, accounting and financing at the local, state and federal levels. This course has embedded experiential (field-based) learning components.

Rationale for Offering the Course:

This course already exists in the hybrid on-campus EDLM program in a 16-week format and summer format. We are only proposing a new number and name for the course to identify it as part of the accelerated on-line EDLM program.

Is there a similar undergraduate course? ◯ Yes ⦿ No   If so, how does this graduate course differ?

Discipline Prefix: EDLM

If more than one provide rationale:

Credits: 3

Level: ◯ 7000 ⦿ 8000 ◯ 9000

Brief rationale for level choice:

Additional Requirements: Laboratory Hours: _____   Pre-Practicum Hours: _____   Practicum Hours: _____

Fieldwork Hours: x   Other (specify): _____

Prerequisite course(s) if any: _____

This course will be: ☑ a Required Course ☐ an Elective   Special/Note: _____

Course is a replacement for (Course Number/Name): EDLM 8036 (replaces Topics course)

Has the course been offered previously as a "Topics" course? ◯ Yes ⦿ No
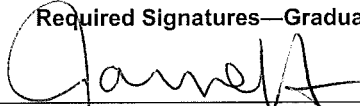
If yes, How often? _____

What is the Expected Average Enrollment?: 30

Which semester will this course first be offered?: _____   How often thereafter to be offered?: Annually

Does this course affect offerings in any other department or program? ◯ Yes ⦿ No   If yes, please explain.

Is this an Extended Campus course? ◯ Yes ⦿ No

Course syllabus must be attached and completed according to Fitchburg State guidelines.

☒   Course Syllabus is Attached

> Print Form

☒   Reviewed by Dean: Dean Bruno Hicks

Required Signatures—Graduate and Continuing Education New Course Approval

Course Developer: _____   Date: 3/20/18

Department Chair: _Nancy Murray_____   Date: 3/21/18

Graduate Council Chair: _____   Date: 4/3/18
(Indicates Graduate Council approval)

President: _____   Date: 5/5/18

FITCHBURG STATE UNIVERSITY

Educational Leadership and Management
Comprehensive Syllabus

EDLM 8036
Managing Human Resources and Budget Development

Instructor:
Contact Information: TBD
Office Hours: TBD

Catalog Course Description:
The focus of this course is two-fold: 1) establishing the rationale and organizational structure that support effective human resource management; and 2) addressing the fiscal and allocated functions of school administration. Topics include but are not limited to the selection of staff, budgeting, teacher induction, financing at the local, state, and federal level, tenure, promotion and dismissal, contracts, compensation and benefits administration, policy making, accounting and financing at the local, state and federal levels. This course has embedded experiential learning components.

Texts:
Brimley, Jr., V., Verstegen, D. A., & Garfield, R. R. (2011). *Financing education in a climate of change.* *(11th Edition).* Boston, MA: Allyn and Bacon

Webb, L. D. & Norton, M. S. (2012). *Human resources administration: Personnel issues and needs in education. (6th ed.).* New York: Prentice Hall, Inc.

Other Resources:
Fitchburg State University Educator Preparation Programs. (2017). *Conceptual framework.* Fitchburg, MA. Retrieved from http://www.fitchburgstate.edu/edunit/ConceptualFramework2.cfm]

Massachusetts Department of Elementary and Secondary Education. (2017). *Curriculum frameworks.* Malden, MA. Retrieved from http://www.doe.mass.edu/frameworks/current.html

Massachusetts Department of Elementary and Secondary Education. (2009). *District standards and indicators.* Malden, MA. Retrieved from http://www.doe.mass.edu/boe/docs/0609/spec_item1_attach4.pdf]

Fitchburg State University Education Unit Conceptual Framework

This course will address the dispositions of the Conceptual Framework in the following way(s):

Knowledgeable: As a result of the learning experiences in the course, the student will become more cognizant of:
- The financial and human resources needed to manage schools and school districts
- School budgetary and accounting control systems
- Site-based budgeting issues
- Accounting controls
- How to involve community members in the development of educational budgets
- Applicable technologies for school management and business procedures
- Risk management
- Faculty and other stakeholder needs for professional development
- Job analysis procedures, supervisory techniques and performance appraisals for both instruction and non-instruction staff
- How to negotiate and manage collective bargaining and/or other written agreements
- Support service management such as before and after school programs, transportation, food services, and buildings and grounds

Skillful: As a result of the learning experiences in the course, the student will become better able to:
- Communicate to the school and its community how educational goals are aligned with the budgetary process
- Manage capital assets, as well as goods and services, further allocating these resources in accordance with school department budgetary guidelines
- Employ faculty as a resource
- Organize, orchestrate, and evaluate professional development programs that are aligned with district and school priorities
- Focus professional development activities on improved student outcomes
- Apply adult learning-strategies to professional development
- Ensure that new knowledge and skills are practiced
- Devise and then implement self-development plans that promote professional growth
- Apply counseling/mentoring skills
- Utilize stress and conflict management techniques

Caring: As a result of the learning experiences in the course, the student will become more competent in the ability to:
- Work effectively with colleagues
- Work respectively with colleagues
- Promote multicultural awareness, gender sensitivity, and racial and ethnic appreciation

Ethical: As a result of the learning experiences in the course, the student will become more competent in the ability to:
- Recognize lawful and contractual obligations or requirements and procedures in the educational setting
- Make moral and ethical financial and human resource decisions
- Follow appropriately the policies, criteria and processes for recruitment, selection, induction, compensation and evaluation of personnel, in recognition to issues of equity and diversity

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Field Experience: This course requires field experiences in order to complete assignments. Field assignments will develop student knowledge, skills, and dispositions as administrators at the level of licensure (supervisor, director, or principal) in regard to school finance and human resources. The following assignments require field experience:

School District/School/Department Budget Analysis

Scheduling Assignment

Student Learning Objectives:
At the conclusion of the course, the student will be able to:
- Analyze the processes of educational budget development and administration
- Manage capital assets, procure goods and services, and how to allocate resources
- Use munis accounting software as a tool to control budgets
- Budget for technology plans that appropriately reflect new technological developments and needs
- Manage site-based budget issues
- Ensure efficient and effective operational systems (e.g., maintenance, transportation, food service) and supports their continuous improvement
- Implement a cohesive approach to human resource management that promotes high quality and effective staff and professional growth, consistent with state licensure, effective employment practices, and collective bargaining agreements
- Apply theories of human development, adult learning and motivation as it pertains to targeted professional development
- Develop a scheduling system that provides sufficient time for instruction, as well as time for teacher planning and collaboration
- Analyze personnel management and labor relations problems
- Expect, model, and support use of technology for management and communication purposes
- Resolve conflict, mediate and negotiate

Course Content:

Evolution of School Business Management and Administration
- Management Theory
- Organizational Structure and Governance
- Budgeting Philosophies
- Education as a State Function
- Federal Interest in Education.

Financing Education
- Need for Adequate Funds, Equitable Financing
- Sources of Revenue (Federal, State, Local), Federal, State, and Private Reimbursement Programs, Federal Grants, State Grants, Private Grants, Town or City Budget and Revenue, Public Funds and Nonpublic Schools
- Fiscal Planning and Forecasting, Strategic Plan, Long-Range Plan, Superintendent Goals

Components/Considerations of a School Budget
- Administering the District and School Budget
- Computerized Budgeting Tools
- Department Budget Process (Supervisor/Director)/School Budget Process (Principal students only
- Site Based Budget Management
- The role of the School Committee/Governing Board/School Council
- Relevant Federal Mandates, Chapter 70, Contractual Obligations to Employees, Special Education Population Needs, Proposition 2 ½
- Utility Rates, Operational Systems, Technology Budget, Impact of Cost of Living Rates, Annual Appropriations and Revolving Accounts, Status of Appropriations Reports, Variance Reports, Encumbrances, Budget Transfers, Expense Transfers, Enrollment Figures, , Financial Outlook, Growth, Spending per Pupil.
- Purchasing Procedures: Chapter 30B, Chapter 149, Exclusions to Public Purchasing Requirements.

Human Resource Management and Personnel Administration
- Organization Climate and Process
- The Human Resource Function
- Strategic Planning, Human Resources and School Finance,
- Recruitment, Selection, and Retention
- Negotiation Strategies, Placement and Induction,
- Establishing and Sustaining a Professional Culture
- Motivation and Staff Development
- Performance Evaluation, Promotion,
- Process of Compensation, Collective Bargaining, Legal Aspects,

Additional Nuts and Bolts
- School Transportation Administration: School Committee Policy, DESE Transportation Requirement, Contract vs. School District Ownership, Routes and Scheduling, State Inspections and Governance.
- Food Service Program: Efficient Operation, Contract vs. School District Ownership, Staffing, Menu Planning, Cash Collections and Point of Sale Accounting.
- School Fees: Athletic, Parking, Bussing, Student Activity.

- Operations and Maintenance of School Facilities: Preventative Maintenance Programs, Privatizing Custodial and Maintenance Services, Civil Service Rules and Regulations, Green School Programs, Regionalization of Services.
- Current Issues: School Choice, Charter Schools, Health Insurance for School Employees, Cost of Bullying to School Districts, Dismissal of Professional Staff Members.

Instructional Strategies:
Multiple modes of instruction will be utilized for this course. Students work on projects individually, frequently posting to Blackboard setting for peer feedback. Students will bring real situations from the field to add to these scenarios and hypothetical situations while always abiding by confidentiality. Additionally, through readings, research, and discussion, students will acquire the knowledge, content, skills, and techniques to develop and plan for advantageous and appropriate school technology use.

X *Blackboard* platform	Interviewing
X Case Study Analysis	Laboratory
X Collaborative Learning	**X** Lecture/Presentation
X Collaborative Learning Groups	Mentored Learning
X Computer Application	Pre-Practicum
X Creating Visual Illustration of Concepts	**X** Problem Finding/Solving
X Data Collection and Analysis	Reflective Response
Discovery	Role Playing/Simulation
X Discussion/Questioning	**X** Student Presentations
Field Experience	Viewing or Listening and Discussion
Field Trip	Other:
Independent Learning	Other:
X Independent Research & Study	Other:

Course Requirements:
- **Participation:** Students are expected to respond as required by submitting posts and assignments on time (e.g., daily, weekly), and to be prepared to communicate with the professor regarding any issues that may impeded their ability to participate in assignments, discussions, chats, etc. Absences and tardiness may result in a permanent grade change. Participation in on-line class discussions and cooperative groups is expected. All students are responsible for meeting required deadlines on projects and assignments.

- **School District/School/Department Budget Process Analysis (Summative Assessment)** Review public budget data in town or city documents as well as local media for a school district that you are associated with to formulate responses to the numbered items below. If there is no association, consult with your professor to identify a district to review. List actual line items and associated costs wherever possible. Please note that this is an individual assignment. Do NOT do this assignment in pairs or groups.

  1. School District (name)
  2. School Budget Process: Summarize the district's budget process (i.e., what is the purpose; who is ultimately responsible; what are the important dates or milestones; when does the budget process start and end, and what activities are in-between; through what departments, committees and sub-committees must the budget pass before it is approved; are there guidelines and if so, what are they; is the budget responsive to a plan, such as a strategic or long-range plan; are there hearings; to whom is the budget proposal submitted for final approval).
  3. Strategic Plan/Long-Range Plan/Superintendent Goals and other district-wide planning documents: Explain the role of planning documents in the district and the impact these have on the budget process.

PICK FROM #4 or #5 depending on your focus:

4. Department Budget Process: Summarize an individual department's budget process (e.g., from a department head, curriculum leader) to include a description of required materials and/or information to be submitted to appropriate parties, such as a central office. What are the major budget categories for this department? Where do resources for the department budget come from? When are department budgets spent? How well has this entity been funded in recent years and what is the future prospect for funding?

5. School Budget Process: Summarize an individual school's budget process to include a description of the amount and required materials and/or information to be submitted to appropriate parties, such as a central office. What are the major budget categories for the school? Where do resources for the school budget come from? When are school budgets spent? How well has this school been funded in recent years and what is the future prospect for funding?

6. School Committee/School Board: or other public or stakeholder governing body role. Explain the specific role of these entities in the district budgeting process to include when they are involved and to what capacity.

7. Federal Mandates: Are there federal mandates that must be funded or attended to, such as No Child Left Behind? What impact do these mandates have on the budget?

8. Chapter 70: Describe aid and net school spending requirements for this district under Chapter 70 if applicable.

9. Contractual Obligations to Employees: Describe these obligations and their impact on the district's budget, such as commitments through collective bargaining.

10. Utility Rates: Describe current and projected annual utility rates for the district.

11. Operational Systems: Describe the duties involved and the operational system budget for school district *maintenance, transportation, food service*, and *health services*. Go beyond this description to rationalize how the budget and plan supports continuous improvement in each of these areas (Please note that this item relates directly to PSI 2.b and will be assessed with a rubric. Students should dive deep into what these areas are, what the people in these roles do, and how they are funded. Students should work during Practicum experiences to raise any lower rated areas on the rubric from this course.)

12. Technology Budget: Describe yearly technology expenditures for management and communication purposes. Does the district follow a technology plan? Are new technological developments and needs considered (i.e., changing technologies, new technologies, hardware, software)?

13. Impact of Cost of Living Rates: Describe cost of living rates and their potential impact on the budget.

14. Special Education Population Needs: Assess the latest special education population needs, state mandates in this regard, and describe the impact on the budget.

15. Enrollment data: What is the latest enrollment data in the district? What has been the trend in recent years, up or down? Please supply accurate figures and anticipated projections.

16. Additional Resources: Describe any additional resources that require or will require funding.

17. Town or City Budget: Calculate the percentage the school district budget is of the overall town or city budget. Be sure to include any appropriate or descriptive figures.

18. Town or City Revenue: What is the town or city's annual revenue? Research and report on any revenues from new growth, fees, as well as state and federal aid.

19. Financial Outlook: Research and report on the financial outlook for the city or town.

20. Growth: How has the budget grown, or not grown over the last five years? Please show numbers and explain?

21. Current Budget: The district's current budget is (total dollar figure)?

22. Spending per Pupil: What is the district's student population and the current spending per pupil?

- **School District Budget Analysis Presentation (Summative Assessment)** Students present a summary of their budget work in a slide-based presentation format (e.g., PowerPoint) that must not exceed 10 minutes nor contain more than seven slides. Students must videotape themselves and upload this presentation to the course website.

- **Personnel File Assignment (Formative Assessment)** Create a sample personnel file in two separate folders (one for Cori checks and performance evaluations; the other for all other documents and information) for a fictitious person who might hold one of the following positions for two years:

  - building and grounds director
  - custodian
  - food services director
  - school nurse
  - secretary
  - security director
  - transportation director

The file separated into two folders must include:

- a job description
- a job application
- a copy of applicable state licenses
- a sample offer of employment letter applicable to the position
- an IRS Form W-4 (the Employee's Withholding Allowance Certificate)
- a receipt or signed acknowledgment form of employee handbook
- a performance evaluations
- Criminal Offender Record Information (CORI)
- medical evaluation and/or drug screening (if applicable to the position)
- employee benefit forms
- documents pertaining to collective bargaining
- forms to provide next of kin and emergency contacts
- complaints (what would a sample complaint look like for someone in this position)
- performance awards or citations (what would an award/citation in this field look like)
- records of attendance
- attendance or tardiness notes
- completion of training programs pertinent to the respective position (what would this look like)
- warnings and/or other disciplinary actions
- documents relating to the employee's departure (e.g., why she or he was fired or left, unemployment documents, insurance continuation forms)

Creating this sample file as a work of fiction while also believable will require research. Look at information provided by professional affiliations, such as the American Association of School Personnel Administrators, American Association of School Administrators, Association for Supervision and Curriculum Development, National Staff Development Council, as well as web sources, library sources such as ERIC, textbooks on human resource management, and other sources to assemble the sample file. As a sample, fill-in the forms with the types of information one would expect for a professional such as this. Draft letters as they might appear in someone with this position's folder. Above all, make sure that whatever is filled in or written in one document gels with information found in other documents.

- **Human Resource Case Study (Summative Assessment)** Once this personnel file is complete, draft an additional document in case study form (abstract, introduction, case, management and outcomes, references) that reflects on this work. Summarize the performance of the employee over the two

years. Be sure to describe what each form or folder entry means in this analysis. Describe also what your approach for future hires in this position would be while remaining considerate of the DESE standard and indicator, "Implements a cohesive approach to human resource management that promotes high quality and effective staff and professional growth, consistent with state licensure, effective employment practices, and collective bargaining agreements." That is, how would you go about hiring and maintaining high quality and effective staff in this position?

- **Scheduling Assignment (Summative Assessment)** With permission, audio record an interview between you and a school administrator or staff member involved with course scheduling, further assembling a transcript of the interview. Be sure to obtain a full understanding of the current process and the perceived effectiveness of that process. Interview at least one teacher as well to get a sense of how effective she or he feels the process and outcomes are (e.g., is there sufficient time for instruction across disciplines, does the schedule allow time for teacher planning, collaboration, professional development). Record this interview as well for transcription purposes. Please be sure to do the following:

  - Take detailed notes if those interviewed do not approve of recording the session.
  - Refer to interviewees anonymously (Jane Doe, John Doe) in your analyses and documentation *if* those interviewed do not wish to be identified.
  - Attach to these transcripts (or notes) any available data that could help the reader to understand the scheduling process (e.g., tables, lists of course offerings, standard operating procedures manual, software instructions for software that is used).
  - Add to these materials a timeline, drafted by you, that chronologically shows the scheduling process steps.
  - Make a list of what works in this process and what could be improved upon.
  - Assemble all of your findings in memoranda form addressed to your professor, pointing out any part(s) of the process that may be in need of improvement.

If the situation lends itself and you are comfortable in doing so, consider submitting the result of your work to the administrator interviewed for their consideration. Be sure to let your professor know beforehand if you choose to do this. Also, be sure to let your professor know about the administration's response as to your recommendations, if available.

Schedule of Classes, Readings, Activities, and Assignments

Session	Reading and/or Activities	Assignments Due
Week 1	- Introductions, students familiarize themselves with the course format, review the syllabus, and ask questions as to expectations if uncertain of requirements. - Administration of human resources. Typical function, roles, and structures found in human resources. - The Personnel File assignment is explained. As is the Human Resource Case Study assignment, which is a continuation of the Personnel File. - School business management and administration. The larger organizational structure and finance role. Management theories. - - *Read* chapter 1 (The Human Resources Function: Its Organization and Processes), chapter 2 (Strategic Human Resource Planning) and chapter 3 (Recruitment) in in *Human Resources Administration*. - *Read* chapter 1 (The Economics of Education), chapter 2 (The Need for Adequate Funds), and chapter 3 (Financing Education Equitably) in in *Financing Education*. -	Personnel File assignment is assigned.
Week 2	- Financing education. What equitable financing means? Sources of revenue (Federal, State, Local). - Discussion on the School District Budget Analysis assignment. - *Read* chapter 4 (Selection) and chapter 5 (Placement and Induction) in *Human Resources Administration*. - *Read* chapter 4 (Patterns of School Finance Systems) in *Financing Education*. - The recruitment, selection, placement and induction of personnel. - *Read* chapter 5 (Sources of Revenue) in *Financing Education*. - Patterns of school finance systems. Town and/or city budget and revenue. The search for adequate funds, private reimbursement programs, additional resources, grants. - *Read* chapter 6 (Motivation and Staff Development) in *Human Resources Administration*. - *Read* chapter 6 (Eroding Local Control) in *Financing Education*.	- - Book HR Case Study Response - School District Budget Analysis is assigned. -

Week 4	- Motivating and developing staff.	- Book HR
	- *Read* chapter 7 (Performance Evaluation) in *Human Resources Administration*.	Case Study Response
	- *Read* chapter 7 (A State Function) in *Financing Education*.	- Personnel File
	- Eroding local control. Extended state and federal involvement.	assignment
	- Purchasing procedures, Chapter 30B, Chapter 149, exclusions to public purchasing requirements	is due.
	- *Read* chapter 8 (The Compensation Process) in *Human Resources Administration*.	-
	- *Read* chapter 8 (Federal Interest in Education) in *Financing Education*.	
	- Staff development, performance evaluation, and the compensation process.	
	- Scheduling assignment is described.	
	- *Read* chapter 9 (Collective Bargaining) in *Human Resources Administration*.	
	- *Read* chapter 9 (The Influence and Climate of the Courts) in *Financing Education*.	
Week 5	- Collective bargaining.	- Human Resource
	- Influence of the courts.	Case Study
	- *Read* chapter 10 (Legal Aspects of Human Resources Administration) in *Human Resources Administration*.	Assignment is due.
	- *Read* chapter 10 (Public Funds and Nonpublic Schools) in *Financing Education*.	-
	- Dismissal of professional staff members.	
	- The legalities of human resource administration.	
	- *Read* chapter 11 (Financing School Facilities) in *Financing Education*.	
	- Public funds and nonpublic schools.	
	- Financing school facilities, school transportation administration: School Committee policies, DESE transportation requirement, routes and scheduling, food service program and operation, menu planning, cash collections and point of sale accounting,	
	- Contract vs. school district ownership, staffing, state inspections and governance.	
	- School fees such as for athletics, parking, bussing, student activities	
	- Operations and maintenance of school facilities: Preventative Maintenance Programs, Privatizing Custodial and Maintenance Services, Civil Service Rules and Regulations, Green School Programs, MSBA Overview and Governance, Regionalization of Services.	
	- *Read* chapter 12 (Administering the District and School Budget) in *Financing Education*.	

Week 6	- Administration of budgets. Computerized budgeting tools, department budget process (Supervisor/Director), school budget process (Principal), site based management, budgeting systems-program budgeting, line-item budgeting, ZBB budgeting, School Committee/governing body role, relevant federal mandates, Chapter 70, contractual obligations to employees, utility rates, operational systems, technology budget, impact of cost of living rates, annual appropriations and revolving accounts. - Status updates and discussion. - *Read* chapter 13 (Accounting and Auditing) and chapter 14 (Business Aspects of the School Community) in *Financing Education*. - Accounting and auditing. Working with the community. - Administration of budgets continued. Status of appropriations reports, variance reports, encumbrances, budget transfers, expense transfers, enrollment figures, special education population needs, Proposition 2 ½, financial outlook, growth, school choice, spending per pupil. - *Read* chapter 15 (Human Resources and School Finance) in *Financing Education*.	- Scheduling assignment is due.
Week 7	- Looking at the two together. Human Resources and Finance. - Fiscal planning and forecasting, strategic planning, long-range planning, Superintendent goals. - *Read* chapter 16 (The Road Ahead in School Finance) in *Financing Education* - Course summary. - Next steps? - Current issues and their impact on finance and human resources, Charter Schools, health insurance for school employees, cost of bullying to school districts. - Concluding remarks on school finance and human resources. - Course Feedback.	- School District Budget Analysis is due. - School District Budget Analysis Presentations are due

Assignment Distribution for Grading

Assignments	
Activities, Assignments & Participation in Discussions	10%
School District Budget Analysis (**Summative Assessment**)	20%
School District Budget Analysis Presentation (**Summative Assessment**)	20%
Human Resource Case Study (**Summative Assessment**)	20%
Scheduling Assignment (**Summative Assessment**)	10%
Personnel File Assignment (**Formative Assessment**)	20%

Total	100%

Graduate Grading System

4.0	95-100	A
3.7	92-94	A-
3.5	89 – 91	A-/B+
3.3	86 - 88	B+
3.0	83 - 85	B
2.7	80 – 82	B-
2.5	77 – 79	B-/C+
2.3	74 – 76	C+
2.0	71 – 73	C
0.0	0 – 70	F
W	Withdrawn	
IN	Incomplete	
IP	In-Progress	

Extended Campus Students

Fitchburg State University encourages all Extended Campus students to take advantage of online student services. Created in a "virtual student center" just for them, the pages provide access to Counseling Services, Career Services, The Student Activity Center, Library Services, the university bookstore and many other helpful links. Go to the university homepage at http://www.fitchburgstate.edu/ and click on Offices and Services. Scroll down and click on Extended Campus Center.

Distance Learning & Extended Campus Library Services & OneCard

The Gallucci-Cirio Library at Fitchburg State University provides a full range of library services including borrowing privileges; document delivery (books and articles mailed to your home); Interlibrary Loan; reference assistance via: phone, email, IM, Blackboard's Collaboration and Elluminate tools, Skype and in-person; library instruction; research help and more. Any questions relating to library services should be directed to Linda LeBlanc, Access Services Librarian, at 978-665-3062 or dllibrary@fitchburgstate.edu. There is also a special section for Distance Learning and Extended Campus Services at http://fitchburgstate.libguides.com/dlservices outlining the wide range of services available to students and instructions as to how to access them.

Students who are currently registered with the university may access any of the library's subscription databases, including an increasing number with full-text, by visiting the Gallucci-Cirio Library's homepage at http://www.fitchburgstate.edu/academics/library and clicking on the Research Databases button in the center of the page. Students select the resource they want to access from the alphabetical or subject listing. Once clicked on a database title, the student will be prompted for her or his Falcon Key logon information; the same logon used for their Fitchburg State email account and for online Blackboard courses. If the student does not know the Falcon Key username and password or if they have any problems logging in, they can contact the university's Technology Help Desk at 978-665-4500 or helpdesk@fitchburgstate.edu. The Library can issue a temporary guest Falcon Key to use while the Technology Department is setting up the account (call 978-665-3062 or email at dllibrary@fitchburgstate.edu).

All registered Fitchburg State University students are eligible for a Fitchburg State University OneCard ID, which also serves as his or her library card. If the student has not received her or his OneCard yet, they can still access all of Fitchburg State online services as long as they have activated their library account. Activate library accounts in person at the Circulation Desk or online at http://www.fitchburgstate.edu/academics/library/policies/borrowing-renewals/. After activation by the Gallucci-Cirio Library and receipt of their OneCard, students may also use any Massachusetts State College/University Library as well as participating libraries in the Academic and Research Collaborative (ARC) during the current semester.

OneCards are available on campus all year round. Students wanting a OneCard must either present a course registration confirmation at the OneCard Office in the Anthony Building, main campus or complete the online Extended Campus OneCard request form, which can be found at http://web.fitchburgstate.edu/technology/onecard/photoless/index.cfm. The OneCard Office number is 978-665-3039.

Fitchburg State University Library Online Services
Online Library Services may be accessed through the Fitchburg State University Homepage at www.fsc.edu/library. Students may access any of several full-text online databases. Passwords are available to students by calling 978-665-3762. Degree students are eligible for a Fitchburg State University ID, which allows use of all Massachusetts State University libraries for the current semester. ID card is available on campus. To obtain an ID card, student must present course registration confirmation at Academic Computing and Media Services, room 229, the Conlon Arts Building. Call 978-665-3039 for available times.

University Policies

Students with Disabilities
Disability Services is the primary support system for students with disabilities taking classes in the day and evening divisions. The office is located on the third floor of the Hammond Building and can be reached at 978/665-3427 or 978/665-3575 TTY. If you need course adaptations or accommodations because of a disability, please talk with me. It is important that the issues relating to disabilities be discussed with me as soon as possible.

Grade Appeal
If you disagree with the evaluation of your work or believe an improper grade has been assigned, an appeal may be followed. Please discuss the matter with the instructor and refer to the Fitchburg State University Grade Appeal Policy in your Student Handbook.

Academic Integrity Policy
The faculty in the Education Unit at Fitchburg State University adhere to the policy that work submitted in fulfillment of course requirements will be solely that of the individual student and all other sources will be cited appropriately. University Academic Integrity Policy, as outlined in the University Catalogue, will be strictly adhered to.

Copyright Policy
You are reminded that, in preparing handouts for peers or the instructor, reproduction of copyrighted material without permission of the copyright owner is illegal. Such unauthorized copying may violate the rights of the author or publisher. Fitchburg State University adheres to federal laws regarding use of copyrighted materials. See the Student Handbook for more details.

Instructor Policies:

Attendance and Participation

1. Attendance is taken at all on-line class meetings. As an emerging professional, you are expected to attend every on-line class session, to be on time, to be prepared and to communicate with the instructor regarding any absences. Absences and tardiness may result in a permanent grade change.

2. Participation in on-line discussions and cooperative groups is expected. All students are responsible for meeting required deadlines on projects and assignments; your ability to complete tasks in a timely fashion demonstrates professional maturity and an ability to organize and manage time. **Completion of <u>assigned reading</u> is imperative to your individual development as a professional.**

3. All of these behaviors regarding attendance, preparation, and meeting deadlines are factored into the final grade.

Assignments

1. All assignments must be typed, doubled-spaced, and use APA format when appropriate.

2. Assignments must be submitted on the due date unless other arrangements have been made with the instructor **PRIOR TO THE DUE DATE**. No late work will be accepted unless arrangements have been made with the instructor and an extended due date negotiated. Late assignments may incur a reduction of points/day late.

All students are expected to demonstrate a level of writing proficiency that is appropriate for emerging professionals in the field of education and at the **graduate level**. Assignments that are handed in with obvious spelling errors, inadequate sentence structure, and a lack of organization will not be graded and will be returned to the student. Students are responsible for the revision process. If improvement is not made on the second assignment, the lack of writing proficiency will be reflected in the grade given on the assignment.

Please communicate with me early in the semester if you are concerned about written assignments, so that I can assist you in getting the support you may need.

Resources

Bartolomeo C. (2004, November). The funding divide. *American Teacher*, 6-7, 20.

Crawford C. (2004). The critical issue of financing schools. *The Delta Kappa Gamma Bulletin, 71,* 22-26.

King R. A., Swanson A. D., & Sweetland S. R. *(*2005). Designing finance structures to satisfy equity and adequacy goals. *Education Policy Analysis Archives, 13,* 1-26.

Odden A. *(2003).* Equity and adequacy in school finance today. *Phi Delta Kappan, 85,* 120-125.

Williams J. (2006, Summer). Looking at the foundation program for financing Alabama's public schools. *The PARCA Quarterly.* Retrieved from http://parca.samford.edu/PARCA2/newsletters/Summer2006.pdf

Hanushek, E. A., & Lindseth. A. A (2009). *Schoolhouses, courthouses, and statehouses: Solving the funding-achievement puzzle in America's public schools*. Princeton, NJ: Princeton University Press.

Hanushek, E. A., & Yilmaz, K. (2013, December). Schools and location: Tiebout, Alonso, and governmental finance policy *Journal of Public Economic Theory,* 15(6), 829-855.

Heneman, H. G., III, & Milanowski, A. T. (2007). *Assessing human resource alignment: The foundation for building total teacher quality Improvement*. Madison, WI: University of Wisconsin, Wisconsin Center for Education Research, Consortium for Policy Research in Education.

Odden, A. (2011). *Strategic management of human capital in education*. New York: Routledge.

Seyfarth, J. T. & Wood, E. G.. (2007). Human resource management for effective schools (5th ed.). Boston: Pearson.

Berman, E. M., Bowman, J. S. West, J. P., & Van Wart, M. R. (2012). Human resource management in public service: Paradoxes, processes, and problems (4th ed.). Thousands Oak, CA: Sage.

Smith, R. (2013). *Human resources administration: A school based perspective* (4th ed.). New York: Taylor & Francis.

Forms, Rubrics, Procedural Documents

for

EDLM 8036 Managing Personnel and Budget Development

School District/School/Department Budget Process Analysis

(SUMMATIVE ASSESSMENT)

Component	Does not Meet Standard	Acceptably Meets the Standard	Comprehensively Meets the Standard
	Does not consistently meet minimal expectations for standard; often needs support to perform at acceptable level	Meets expectations for standard; needs occasional minimal support	Meets expectations for standard; is confidently and consistently meeting the standard, needs little, if any, support/guidance
District Budget Process	• responsibilities of individuals, departments and committees who assemble and approve the budget are not or minimally described • important dates or milestones are not listed • activities toward budget completion are not described or minimally described • guidelines are not specified or minimally specified • no association is made of the budget to the district's strategic or long-range plans	• responsibilities of the individuals, departments and committees who assemble and approve the budget are adequately described • important dates or milestones are listed • activities toward budget completion are adequately described • guidelines for the budget process are listed • the role of the budget in the district's strategic or long-range plans is somewhat clear	• responsibilities of all individuals, departments and committees who assemble and approve the budget are comprehensively described • important dates or milestones are listed in full • activities toward budget completion are comprehensively described • guidelines for the budget process are specified in full • the role of the budget in district's strategic or long-range plans is clear
Department Budget Process	• the department's budget process is not or is minimally described • the required materials and/or information to be submitted to whom and when is unclear or not presented • the major budget categories are not or are minimally described • the time when budgets are spent is unclear • how well this department has been funded in recent years with projections toward future funding is not or is minimally presented	• the department's budget process is clearly described • the required materials and/or information to be submitted to whom and when is outlined • the major budget categories are adequately described • the time when budgets are spent is outlined • how well this department has been funded in recent years with projections toward future funding is presented	• the department's budget process is comprehensively described • the required materials and/or information to be submitted to whom and when is clearly outlined • the major budget categories are fully described • the time when budgets are spent is clearly outlined • how well this department has been funded in recent years with projections toward future funding is fully analyzed and presented

Component	Does not Meet Standard	Acceptably Meets the Standard	Comprehensively Meets the Standard
	Does not consistently meet minimal expectations for standard; often needs support to perform at acceptable level	Meets expectations for standard; needs occasional minimal support	Meets expectations for standard; is confidently and consistently meeting the standard, needs little, if any, support/guidance
School Budget Process	- the school's budget process is not or is minimally described - the required materials and/or information to be submitted to whom and when is unclear or not presented - the major budget categories are not or are minimally described - the time when budgets are spent is unclear - how well this school has been funded in recent years with projections toward future funding is not or is minimally presented	- the school's budget process is clearly described - the required materials and/or information to be submitted to whom and when is outlined - the major budget categories are adequately described - the time when budgets are spent is outlined - how well this school has been funded in recent years with projections toward future funding is presented	- the school's budget process is comprehensively described - the required materials and/or information to be submitted to whom and when is clearly outlined - the major budget categories are fully described - the time when budgets are spent is clearly outlined - how well this school has been funded in recent years with projections toward future funding is fully analyzed and presented
Ensures efficient and effective maintenance activities and supports their continuous improvement	Shows <u>minimal</u> knowledge of the role for - incident and complaint response - security activities, such as the maintenance of locks, doors and windows - maintaining safe schools - budgeting for this area - the inspection of repair work and new construction - hiring staff, then ensuring the training, and supervision of personnel	Shows <u>competent</u> knowledge of the role for - incident and complaint response - security activities, such as the maintenance of locks, doors and windows - maintaining safe schools - budgeting for this area - the inspection of repair work and new construction - hiring staff, then ensuring the training, and supervision of personnel	Shows <u>extensive</u> knowledge of the role for - incident and complaint response - security activities, such as the maintenance of locks, doors and windows - maintaining safe schools - budgeting for this area - the inspection of repair work and new construction - hiring staff, then ensuring the training, and supervision of personnel

Component	Does not Meet Standard	Acceptably Meets the Standard	Comprehensively Meets the Standard
	Does not consistently meet minimal expectations for standard; often needs support to perform at acceptable level	Meets expectations for standard; needs occasional minimal support	Meets expectations for standard; is confidently and consistently meeting the standard, needs little, if any, support/guidance
Ensures efficient and effective transportation and supports their continuous improvement	Demonstrates minimal knowledge of the role for • recruitment, training, and retaining of drivers • managing fleet operations and maintenance • ensuring safe operations • budgeting for this area • reporting incidents and accidents • complying with federal and state laws • submitting reports to educational leadership	Demonstrates competent knowledge of the role for • recruitment, training, and retaining of drivers • managing fleet operations and maintenance • ensuring safe operations • budgeting for this area • reporting incidents and accidents • complying with federal and state laws • submitting reports to educational leadership	Demonstrates extensive knowledge of the role for • recruitment, training, and retaining of drivers • managing fleet operations and maintenance • ensuring safe operations • budgeting for this area • reporting incidents and accidents • complying with federal and state laws • submitting reports to educational leadership
Ensures efficient and effective food service and supports their continuous improvement	Demonstrates minimal knowledge of the role for • the supervision of the overall operation from food purchases in high volume, storage and preparation • budgeting in this area • reporting properly to federal, state and/or local agencies of food service practices • hiring, training, and supervising personnel • applying for federal subsidies and government reimbursements	Demonstrates competent knowledge of the role for • the supervision of the overall operation from food purchases in high volume, storage and preparation • budgeting in this area • reporting properly to federal, state and/or local agencies of food service practices • hiring, training, and supervising personnel • applying for federal subsidies and government reimbursements	Demonstrates extensive knowledge of the role for • the supervision of the overall operation from food purchases in high volume, storage and preparation • budgeting in this area • reporting properly to federal, state and/or local agencies of food service practices • hiring, training, and supervising personnel • applying for federal subsidies and government reimbursements

Component	Does not Meet Standard	Acceptably Meets the Standard	Comprehensively Meets the Standard
	Does not consistently meet minimal expectations for standard; often needs support to perform at acceptable level	Meets expectations for standard; needs occasional minimal support	Meets expectations for standard; is confidently and consistently meeting the standard, needs little, if any, support/guidance
Ensures efficient and effective health services and supports their continuous improvement	Demonstrates <u>minimal</u> knowledge of the role in • collaborating with administrators regarding physically, mentally, and emotionally fragile students • budgeting in this area • ensuring compliance with federal, state and/or local agencies • hiring, training, and supervising health staff personnel on issues and health plans • setting, maintaining, and revising school health policies and procedures • applying for federal subsidies and government reimbursements	Demonstrates <u>competent</u> knowledge of the role in • collaborating with administrators regarding physically, mentally, and emotionally fragile students • budgeting in this area • ensuring compliance with federal, state and/or local agencies • hiring, training, and supervising health staff personnel on issues and health plans • setting, maintaining, and revising school health policies and procedures • applying for federal subsidies and government reimbursements	Demonstrates <u>extensive</u> knowledge of the role in • collaborating with administrators regarding physically, mentally, and emotionally fragile students • budgeting in this area • ensuring compliance with federal, state and/or local agencies • hiring, training, and supervising health staff personnel on issues and health plans • setting, maintaining, and revising school health policies and procedures • applying for federal subsidies and government reimbursements
Expects, models, and supports use of technology for management and communication purposes; develops a technology plan yearly that appropriately reflects new technological developments and needs and provides updates as needed	• does no or little research as to whether or not the district plans for technology change • does not identify a district technology-based initiative for management and/or communication purposes • does not determine whether or not the district has a technology plan	• shows research as to whether or not the district plans for technology change • identifies and describes a district technology-based initiative for management and/or communication purposes • determines whether or not the district has a technology plan, briefly describing the district's thinking in this area.	• shows significant research as to how the district plans for technology change • describes district technology-based initiatives for management and communication purposes • determines whether or not the district has a technology plan, describing in detail the district's approach in this area

Component	Does not Meet Standard	Acceptably Meets the Standard	Comprehensively Meets the Standard
	Does not consistently meet minimal expectations for standard; often needs support to perform at acceptable level	Meets expectations for standard; needs occasional minimal support	Meets expectations for standard; is confidently and consistently meeting the standard, needs little, if any, support/guidance
Other Required Sections	Check all that were not addressed or minimally addressed in this analysis:	Check all that were acceptably addressed in this analysis:	Check all that were comprehensively addressed in this analysis:
	☐ Federal Mandates ☐ Chapter 70 ☐ Employee Contractual Obligations ☐ Utility Rates ☐ Cost of Living Rates ☐ Special Education Population Needs ☐ Enrollment Data ☐ Additional Resources ☐ Town or City Budget ☐ Town or City Revenue ☐ Financial Outlook ☐ Growth ☐ Spending per Pupil	☐ Federal Mandates ☐ Chapter 70 ☐ Employee Contractual Obligations ☐ Utility Rates ☐ Cost of Living Rates ☐ Special Education Population Needs ☐ Enrollment Data ☐ Additional Resources ☐ Town or City Budget ☐ Town or City Revenue ☐ Financial Outlook ☐ Growth ☐ Spending per Pupil	☐ Federal Mandates ☐ Chapter 70 ☐ Employee Contractual Obligations ☐ Utility Rates ☐ Cost of Living Rates ☐ Special Education Population Needs ☐ Enrollment Data ☐ Additional Resources ☐ Town or City Budget ☐ Town or City Revenue ☐ Financial Outlook ☐ Growth ☐ Spending per Pupil

Personnel File Assignment Rubric
(FORMATIVE ASSESSMENT)

Component	Does not Meet Standard	Acceptably Meets the Standard	Comprehensively Meets the Standard
	Does not consistently meet minimal expectations for standard; often needs support to perform at acceptable level	Meets expectations for standard; needs occasional minimal support	Meets expectations for standard; is confidently and consistently meeting the standard, needs little, if any, support/guidance
Personnel Folder Checklist	Check all that were not addressed or minimally addressed: ☐ Job Description ☐ Job Application ☐ Copies of Applicable State Licenses ☐ Offer Letter ☐ W-4 ☐ Acknowledgement Form ☐ Performance Evaluation Forms ☐ CORI ☐ Medical Evaluation (if applicable) ☐ Drug Check (if applicable) ☐ Employee Benefit Forms ☐ Collective Bargaining Documents ☐ Next of Kin/Emergency Contacts ☐ Complaints ☐ Performance Awards and Citations ☐ Attendance Records ☐ Training Program Records ☐ Warnings/Disciplinary Actions ☐ Employee Departure Documents	Check all that were acceptably addressed: ☐ Job Description ☐ Job Application ☐ Copies of Applicable State Licenses ☐ Offer Letter ☐ W-4 ☐ Acknowledgement Form ☐ Performance Evaluation Forms ☐ CORI ☐ Medical Evaluation (if applicable) ☐ Drug Check (if applicable) ☐ Employee Benefit Forms ☐ Collective Bargaining Documents ☐ Next of Kin/Emergency Contacts ☐ Complaints ☐ Performance Awards and Citations ☐ Attendance Records ☐ Training Program Records ☐ Warnings/Disciplinary Actions ☐ Employee Departure Documents	Check all that were comprehensively addressed: ☐ Job Description ☐ Job Application ☐ Copies of Applicable State Licenses ☐ Offer Letter ☐ W-4 ☐ Acknowledgement Form ☐ Performance Evaluation Forms ☐ CORI ☐ Medical Evaluation (if applicable) ☐ Drug Check (if applicable) ☐ Employee Benefit Forms ☐ Collective Bargaining Documents ☐ Next of Kin/Emergency Contacts ☐ Complaints ☐ Performance Awards and Citations ☐ Attendance Records ☐ Training Program Records ☐ Warnings/Disciplinary Actions ☐ Employee Departure Documents

DATA FROM THE FOLLOWING ASSESSMENT WILL BE UPLOADED TO TK20 FOR FORMAL DATA COLLECTION, ANALYSIS AND EVALUATION.

**Human Resource Case Study Assignment
(SUMMATIVE ASSESSMENT)**

Component	Does not Meet Standard	Acceptably Meets the Standard	Comprehensively Meets the Standard
	Does not consistently meet minimal expectations for standard; often needs support to perform at acceptable level	Meets expectations for standard; needs occasional minimal support	Meets expectations for standard; is confidently and consistently meeting the standard, needs little, if any, support/guidance
Case Study	• not written in a case study format • abstract missing or minimally frames the case • minimal or un clear introduction • case is unclear • management actions and outcomes are missing or minimally presented • references missing or not well chosen • references are missing or minimally integrated throughout the case study	• mostly written in a case study format • abstract adequately frames the case • clear introduction • case is clearly presented • management actions and outcomes are rational and clearly presented • most references are well chosen • references are fairly well integrated throughout the case study as appropriate	• consistently written in a case study format • thorough abstract clearly frames the case • thorough and clear introduction • case is clearly and fully presented • management actions and outcomes are rational and thoroughly presented • references are well chosen • references are well integrated throughout the case study as appropriate

Component	Does not Meet Standard	Acceptably Meets the Standard	Comprehensively Meets the Standard
	Does not consistently meet minimal expectations for standard; often needs support to perform at acceptable level	Meets expectations for standard; needs occasional minimal support	Meets expectations for standard; is confidently and consistently meeting the standard, needs little, if any, support/guidance

Approach to Human Resource Management	• there is no or little evidence that the student can implement a cohesive approach to human resource management for this position
	• there is no or little evidence that the student can promote or provide for:
	  o high quality staff
	  o effective staff
	  o professional growth
	  … that is consistent with
	  o state licensure
	  o or effective employment practices
	• or collective bargaining agreements
		• there is adequate evidence that the student can implement a cohesive approach to human resource management for this position
		• there is adequate evidence that the student can promote or provide for:
		  o high quality staff
		  o effective staff
		  o professional growth
		  … that is consistent with
		  o state licensure
		  o or effective employment practices
		• or collective bargaining agreements
			• there is significant evidence that the student can implement a cohesive approach to human resource management for this position
			• there is significant evidence that the student can promote or provide for:
			  o high quality staff
			  o effective staff
			  o professional growth
			  … that is consistent with
			  o state licensure
			  o or effective employment practices
			• or collective bargaining agreements

DATA FROM THE FOLLOWING ASSESSMENT WILL BE UPLOADED TO TK20 FOR FORMAL DATA COLLECTION, ANALYSIS AND EVALUATION.

Scheduling Assignment
(SUMMATIVE ASSESSMENT)

Component	Does not Meet Standard	Acceptably Meets the Standard	Comprehensively Meets the Standard
	Does not consistently meet minimal expectations for standard; often needs support to perform at acceptable level	Meets expectations for standard; needs occasional minimal support	Meets expectations for standard; is confidently and consistently meeting the standard, needs little, if any, support/guidance
Ensures a comprehensive scheduling system that provides sufficient time for instruction, teacher planning and collaboration	• demonstrate minimal understanding of what the scheduling system is in terms of: 　○ sufficient time for instruction 　○ teacher planning 　○ collaboration • does not provide a feasible solution to existing scheduling problems	• demonstrates a competent understanding of what the scheduling system is in terms of: 　○ sufficient time for instruction 　○ teacher planning 　○ collaboration • makes somewhat informed and rational suggestions for improvement	• demonstrates a thorough understanding of what the scheduling system is in terms of: 　○ sufficient time for instruction 　○ teacher planning 　○ collaboration • makes well informed and thoughtful suggestions for improvement