

PUBLIC SCHOOL FINANCE ASSESSMENT PROJECT ALIGNED WITH ELCC STANDARDS*

D. Michael Risen

This work is produced by OpenStax-CNX and licensed under the
Creative Commons Attribution License 2.0[†]

Abstract

This is a detailed description of an assessment that can be used in a graduate level of study in the area of public school finance. This has been approved by NCATE as meeting all of the stipulated ELCC standards for which it is designed (1.1, 1.2, 1.3, 1.4, 1.5, 2.1, 2.2, 2.3, 2.4, 3.1, 3.2, 3.3, 4.1, 4.2, 4.3, 5.1, 5.2, 5.3.).

This course of study appropriate for this assessment is both skills and knowledge focused. The assessment measures the student's ability to think critically and requires students to identify and analyze real school district data regarding revenue and expenditures, a formula for predicting needed staffing levels and a comprehensive listing of personnel data detailing all expenditures per employee. Finally, the assessment provides students the opportunity to role play experiences one might have during a district-wide administrator meeting and during a public school board meeting by presenting their recommendations via a formal presentation with their peers serving as school board members and the professor as the school district superintendent.



NOTE: This module has been peer-reviewed, accepted, and sanctioned by the National Council of Professors of Educational Administration (NCPEA) as a scholarly contribution to the knowledge base in educational administration.

BUDGET REDUCTION PROJECT

Directions to Candidates:

This is a team project. You have just received completed budget information for your school and district and the proposed staffing formula information for the coming year from the superintendent and the preliminary revenue information is not encouraging. Additionally, you have been provided with strategic plan information related to current year and coming year strategies for the five year plan. Your school board has

*Version 1.1: May 21, 2008 9:49 am -0500

[†]<http://creativecommons.org/licenses/by/2.0/>

passed a policy for the superintendent to implement that is a staffing formula based upon specified student to teacher ratios and tied to past student enrollment figures. As the principal, you must use all of this information to work with the other four school administrators on your team to plan, organize, evaluate and develop a plan of budget reductions for your schools that will support balancing the district's budget for the coming school year. Each team member will represent one of the district's site administrators (either principal or assistant principal – 5 team members in all). The proof of your success will be realized in providing recommendations from each of the four buildings that will result in a combined reduction of \$2.5 million for the coming school year for the district budget. You will provide both a written report to the superintendent and a Power Point presentation to be presented by your team to the Board of Education. Class time will be devoted to simulated administrator meetings where the Professor will play the role of the Superintendent conducting these meetings with each of you as the school site administrators to discuss strategies for the completion of these reports and Board of Education presentations. (30 possible points)

The following components should be addressed in your budget reduction plan

- The candidate's report reflects recommendations that are clearly consistent with the district's stated vision (1.1a)
- The report is written professionally and based on data and research from the district's strategic information packet(1.2b).
- The detailed report reflects ideas to motivate staff, students and families to support the recommendations (1.3a).
- Students demonstrate through the simulated meetings a significant understanding of the role effective communication plays in the process (1.4a).
- The Power Point presentation highlights recommendations that will likely be effective in involving all stakeholders in the implementation of the recommendations (1.5a)
- Identified reductions reflect that candidates considered the relevant school culture issues related to the demographics of the district (2.1a).
- Reduction recommendations provide a clear rationale to support that the remaining staff and programs will continue to facilitate effective instructional practices and provide appropriate curricular materials (2.2a).
- Reductions are also clearly consistent with an understanding of appropriate research strategies that continue to promote an environment for improved student achievement (2.3c).
- Recommended reductions also reflect careful consideration by the candidate that principles of effective professional growth were considered and provided for in the plan (2.4c).
- The Executive Summary clearly highlights the candidate's attention to using data driven decision making for applying indicators of equity, effectiveness, and efficiency to support the identified reductions (3.1a).
- The Executive summary includes information that reflects the candidates used research based data and group process skills to build support for the plan and align the plan with the organizational vision (3.2a).
- The Executive Summary also reflects the candidate's use of problem-solving skills and strategic planning (3.3a).
- The presentation reflects a clear understanding of the methods needed to secure community support and understanding of the identified budget reductions (4.1c).
- The presentation definitely highlights how the candidates propose preserving programs for students with both special and exceptional needs (4.2c).
- The presentation also strongly discusses ways to provide new resources and funds that might appropriately and effectively encourage the community to provide new resources to address the emerging student problems created by the identified reductions (4.3c).
- The presentation appropriately avoids identifying individuals affected by the recommended reductions so as to protect their dignity and maintain confidentiality (5.1a).
- Recommendations also reflect clear reductions that are to be implemented such that they are fair,

arrived at impartially, and sensitive to the diversity of the district and community (5.2a).

- The recommended reductions are designed such they are clearly consistent within the legal and ethical parameters expected of Illinois candidates (5.3a).

Each student will contribute to both the written report portion of the project as well as the design and implementation of the public presentation.

The team will make a fifteen to thirty minute presentation to the class. The non-presenting members of the class will serve as the school board in this scenario and the professor will play the role of the superintendent. Each team member must be an active participant in all phases of the research, preparation and presentation of the proposed program.

A copy of the proposed written summary of the program and an electronic copy of the Power Point portion of the presentation must be provided to the instructor prior to the night of the presentation. The written document will be a minimum of three typed and/or word processed pages double spaced. The format of this paper will be similar to a grant proposal or an action plan but is open to the creativity of the team.

Recent years have seen public school administrators more and more responsible for effectively financing public schools for the local, state and federal levels. If you become a school administrator in Illinois, you likely will be involved in this type of activity at least once in your career.

Some class time will be provided for team meetings

CONNEXIONS SUBMISSION 1 Scoring Guide

BUDGET REDUCTION PROJECT

BUDGET REDUCTION PLAN RUBRIC

ELH 677 – 30 POSSIBLE POINTS

Name: _____ Semester/Year: _____

Name: _____ Name: _____ Name: _____

Budget Reduction Plan				
Project Component & ELCC Element	28-30 – Target1.5 points each sub-element	23-27 – Acceptable 1.3 points each sub-element	22 - 0 – Unacceptable0-1.2 points each sub-element	Total
<p>FIXME: A LIST CAN NOT BE A TABLE ENTRY. Identify the formula changes recommended, their impact and the rationale for each change recommended.Target – 7 pointsAcceptable – 5 pointsUnacceptable – 0-4 pointsCandidate’s proposal relates to vision, strategic planning, staff motivation, effective communication and involving all stakeholders.ELCC Standards: 1.1, 1.2, 1.3, 1.4, and 1.5</p>	<p>The candidate’s report reflects recommendations that are clearly consistent with the district’s stated vision. (1.1a) The report is written professionally and based on data and research from the district’s strategic information packet (1.2b). The detailed report reflects ideas to motivate staff, students and families to support the recommendations (1.3a). Students demonstrate through the simulated meetings a significant understanding of the role effective communication plays in the process (1.4a). The Power Point presentation highlights recommendations that will likely be effective in involving all stakeholders in the implementation of the recommendations (1.5a)</p>	<p>The candidate’s report reflects some recommendations that are clearly consistent with the district’s stated vision. (1.1a) The report is written professionally and based on some data and research from the district’s strategic information packet (1.2b). The report reflects only some ideas to motivate staff, students and families to support the recommendations (1.3a). Students demonstrate through the simulated meetings some understanding of the role effective communication plays in the process (1.4a). The Power Point presentation highlights recommendations that may be effective in involving all stakeholders in the implementation of the recommendations (1.5a)</p>	<p>The candidate’s report does not reflect recommendations that are consistent with the district’s stated vision. (1.1a) The report is not written professionally and based on data and research from the district’s strategic information packet (1.2b). The report is not detailed enough to reflect ideas to motivate staff, students and families to support the recommendations (1.3a). Students do not demonstrate through the simulated meetings any understanding of the role effective communication plays in the process (1.4a). The Power Point presentation fails to highlight recommendations that will likely be effective in involving all stakeholders in the implementation of the recommendations (1.5a)</p>	
<p>FIXME: A LIST CAN NOT BE A TABLE ENTRY. Identify the reductions generated by the formula changes that are recommended in Item #1 and any other reduc-</p>	<p>Identified reductions reflect that candidates considered the relevant school culture issues related to the demographics of the district (2.1a). Reduction recommendations</p>	<p>Identified reductions reflect that candidates gave some consideration to the relevant school culture issues related to the demographics of the district (2.1a). Reduction</p>	<p>Identified reductions reflect that candidates failed to give consideration to the relevant school culture issues related to the demographics of the district (2.1a).</p>	

<p>FIXME: A LIST CAN NOT BE A TABLE ENTRY. Provide an executive summary memo to the superintendent of schools, Dr. Risen, that identifies in bullet form recommended reductions. Target – 5-6 points Acceptable – 4 points Unacceptable – 0-3 points The proposal and presentation reflects the candidate’s understanding of data-driven decision-making, group process skills, problem-solving skills and strategic planning. ELCC Standards 3.1, 3.2 and 3.3</p>	<p>The Executive Summary clearly highlights the candidate’s attention to using data driven decision making for applying indicators of equity, effectiveness, and efficiency to support the identified reductions (3.1a). The Executive summary includes information that reflects the candidates used research based data and group process skills to build support for the plan and align the plan with the organizational vision (3.2a). The Executive Summary also reflects the candidate’s use of problem-solving skills and strategic planning (3.3a).</p>	<p>The Executive Summary attempts to highlight the candidate’s attention to using data driven decision making for applying indicators of equity, effectiveness, and efficiency to support the identified reductions (3.1a). The Executive summary includes some information that reflects the candidates used research based data and group process skills to build support for the plan and align the plan with the organizational vision (3.2a). The Executive Summary also reflects the candidate’s use of either problem-solving skills or strategic planning (3.3a).</p>	<p>The Executive Summary does not highlight the candidate’s attention to using data driven decision making for applying indicators of equity, effectiveness, and efficiency to support the identified reductions (3.1a). The Executive summary does not include information that reflects the candidates used research based data and group process skills to build support for the plan and align the plan with the organizational vision (3.2a). The Executive Summary does not reflect any evidence that the candidate’s use problem-solving skills or strategic planning (3.3a).</p>	
<p><i>continued on next page</i></p>				

<p>FIXME: A LIST CAN NOT BE A TABLE ENTRY. Identify in the presentation the areas of the budget that are impacted by each of the recommended reductions and support the process to be used to secure approval and community support. Target – 6-7 points Acceptable – 5 points Unacceptable – 0-4 points The candidate’s proposal and presentation reflects the need to involve the community to find new resources to address emerging student problems created by the reductions, addresses preserving programs for both special and exceptional students, protects staff dignity and confidentiality, and are designed to be fair and impartial and within legal and ethical guidelines of Illinois and Federal laws. ELCC Standards 4.1, 4.2, 4.3, 5.1, 5.2 and 5.3.</p>	<p>The presentation reflects a clear understanding of the methods needed to secure community support and understanding of the identified budget reductions (4.1c). The presentation definitely highlights how they propose preserving programs for students with both special and exceptional needs (4.2c). The presentation also strongly discusses ways to provide new resources and funds that might appropriately and effectively encourage the community to provide new resources to address the emerging student problems created by the identified reductions (4.3c). The presentation appropriately avoids identifying individuals affected by the recommended reductions so as to protect their dignity and maintain confidentiality (5.1a). Recommendations also reflect clear reductions that are to be implemented such that they are fair, arrived at impartially, and sensitive to the diversity of the district and community (5.2a). The recommended reductions are</p>	<p>The presentation reflects some understanding of the methods needed to secure community support and understanding of the identified budget reductions (4.1c). The presentation gives some highlights how the candidates propose preserving programs for students with both special and exceptional needs (4.2c). The presentation also somewhat discusses ways to provide new resources and funds that might appropriately and effectively encourage the community to provide new resources to address the emerging student problems created by the identified reductions (4.3c). The presentation attempts to avoid identifying individuals affected by the recommended reductions so as to protect their dignity and maintain confidentiality (5.1a). Recommendations also reflect some reductions that are to be implemented such that they are fair, arrived at impartially, and sensitive to the diversity of the district and community (5.2a). The recommended reductions are</p>	<p>The presentation reflects a clear understanding of the methods needed to secure community support and understanding of the identified budget reductions (4.1c). The presentation definitely highlights how the candidates propose preserving programs for students with both special and exceptional needs (4.2c). The presentation fails to discuss ways to provide new resources and funds that might appropriately and effectively encourage the community to provide new resources to address the emerging student problems created by the identified reductions (4.3c). The presentation fails to avoid identifying individuals affected by the recommended reductions so as to protect their dignity and maintain confidentiality (5.1a). Recommendations do not reflect clear reductions that are to be implemented such that they are fair, arrived at impartially, and sensitive to the diversity of the district and community (5.2a). The recommended reductions are not</p>	
---	---	--	--	--

Conventions ⇒	3Conventions support the project. Rules of punctuation, grammar, capitalization, and sentence structure are maintained.	22-3 convention errors are noted in the project.	0More than 3 convention errors are noted in the project.	
			Total points for project	

Table 1