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3-29-2004

Certificate of Advanced Study in Educational Administration Leading to School District Business Leader Certification

The College at Brockport, College Senate

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SUNY BROCKPORT

Faculty Senate
State University of New York
College at Brockport
350 New Campus Drive
Brockport, NY 14420-2925
(585) 395-2586 (Fax) 395-2246

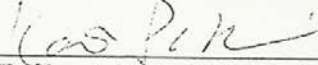
**Resolution # 21
2003-2004
FACULTY SENATE**

TO: Dr. Paul Yu, College President

FROM: The Faculty Senate Meeting on: **March 29, 2004**

RE: I. Formal Resolution (*Act of Determination*)
II. Recommendation (*Urging the Fitness of*)
⇒ III. Other, For Your Information (*Notice, Request, Report, etc.*)

SUBJ: **Certificate of Advanced Study in Educational Administration Leading to School District Business Leader Certification**

Signed:  Date: 4/15/04
(Dr. Kenneth O'Brien, 2002-2004 Faculty Senate President)



TO: The Faculty Senate

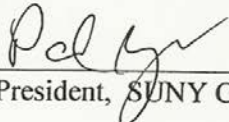
FROM: **Dr. Paul Yu, College President**

RE: I. Decision and Action Taken on Formal Resolution (circle)
a. Accepted. Effective Date: ___/___/___
b. Deferred for discussion with the Faculty Senate on ___/___/___
c. Unacceptable for the reasons contained in the attached explanation

⇒ II, III. Response to Recommendation or Other/FYI
a. Received and acknowledged
b. Comment:

DISTRIBUTED TO: President's Staff O: Originator, Academic
Dean's Council dvisement, Registrar

Distribution Date: 4-5-04

Signed:  Date: 4-5-04
(Dr. Paul Yu, President, SUNY College at Brockport)

**FACULTY SENATE OFFICE
RESOLUTION PROPOSAL COVER PAGE**

DEADLINE FOR SUBMISSIONS: FEBRUARY 23 - Proposals received after 2/23 may not be reviewed until next semester.

Submit all proposals to the Faculty Senate President electronically or on a disk with a hard copy.

Please provide cover page information requested.

facprez@brockport.edu, fSenate@brockport.edu

Faculty Senate Office, 426 Allen Building

NUMBER TO BE ASSIGNED BY SENATE OFFICE

ROUTING
NUMBER*

#63 03-04 GC

1. PROPOSAL TITLE:

Please be somewhat descriptive, for example, *Graduate Probation/Dismissal Proposal* rather than *Graduate Proposal*.

**CERTIFICATE OF ADVANCED STUDY (CAS) IN EDUCATIONAL ADMINISTRATION
Leading to School Building Leader (SBL) Certification**

2. BRIEF DESCRIPTION OF PROPOSAL:

Re-registration of program required by New York State Education Department as a result of the change in administrative certification requirements effective September 1, 2004. There are no changes to this program.

3. SUBMISSION & REVISION DATES: PLEASE DATE ALL UPDATED DOCUMENTS and resubmit to the Senate Office electronically prior to Senate review and vote at fSenate@brockport.edu.

First Submission	Updated on	Updated on	Updated on
3/17/04			

4. SUBMITTED BY: (contact person)

Name	Department	Phone	Email
Dr. Sandra L. Graczyk, Professor and Chair	Educational Administration	395-5802	SLGRACZYK@AOL. COM

5. COMMITTEES TO COPY: (Senate office use only)

Committee	Forwarded To	Date
<input type="checkbox"/> Budget	Committee Chair	3/17/04
<input type="checkbox"/> College Environment	Executive Committee	3/29/04
<input type="checkbox"/> Enrollment Policies	Senate Floor	4/5/04 - <i>announcement</i>
<input type="checkbox"/> General Education	College President	4/2/04
<input checked="" type="checkbox"/> Graduate Curriculum		
<input type="checkbox"/> Personnel Policies		
<input type="checkbox"/> Student Policies		

<input type="checkbox"/> Undergraduate Curriculum		
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*(ROUTING NUMBER WILL BE A CHRONOLOGICAL NUMBER SEQUENCE FOLLOWED BY COMMITTEE INITIALS)

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Please be somewhat descriptive, for example, *Graduate Probation/Dismissal Proposal* rather than *Graduate Proposal*.

CERTIFICATE OF ADVANCED STUDY (CAS) IN EDUCATIONAL ADMINISTRATION
Leading to School District Business Leader (SDBL) Certification

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First Submission	Updated on	Updated on	Updated on
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<input type="checkbox"/> Personnel Policies		

__ Student Policies		
__ Undergraduate Curriculum		

*(ROUTING NUMBER WILL BE A CHRONOLOGICAL NUMBER SEQUENCE FOLLOWED BY COMMITTEE INITIALS)

**APPLICATION FOR APPROVAL OF A PROGRAM LEADING TO CERTIFICATION
AS A
SCHOOL DISTRICT BUSINESS LEADER**

I. PROGRAM PROVIDER

Programs for the preparation of educational leaders shall be graduate programs offered by institutions of higher education, or by institutions of higher education collaborating with school districts or with educational or leadership associations.

The Department of Educational Administration at SUNY Brockport hereby submits this application for a Certificate of Advanced Studies (CAS) in School Business Administration Program leading to the School District Business Leader (SDBL) certification.

The program is offered only in a cohort format. (The Department calls these cohorts “cycles.”) Because students come from all over New York State (west of the Hudson River), some of the cycle courses are offered at Genesee Community College in Batavia, others at the SUNY MetroCenter in downtown Rochester, and one (EDA 692 Design and Use of Microcomputer Systems for School Business Administrators) on the SUNY Brockport campus. This combination of courses and locations totals 42 credit hours. These locations were picked to help ease the driving burden of students.

New cycles start approximately every two years. During the two-year interval between cycles, the Program Coordinator maintains a list of prospective students (individuals who have contacted the Department and have expressed interest in the program). These prospective students have been recommended to the program from superintendents and current school business administrators who know of its reputation and from current students and program graduates. Each prospective student receives a phone call from the Program Coordinator to discuss the program and answer questions; each prospective student is also mailed a packet of information that explains in detail the program and its logistics (Appendix A). Approximately one year prior to the start of a new cycle, a flyer (Appendix B) detailing the program and the upcoming cycle of courses is mailed to the prospective students on the list. The flyer contains a response form that the recipients can then complete and return to indicate that they wish to apply for matriculation into the program and start courses in the new cycle. This method always produces an acceptable entry class size. No direct marketing or flyer mailing to school districts is needed.

Within a cycle, six credit hours of course work are offered each fall and spring semester, and three credit hours of course work are offered in each of two summer semesters, making it possible for individuals to complete the program in three years. Candidates in cycle courses generally remain together throughout the program and become a strong cohesive group, providing the added benefit of a lifelong professional network. During the fall and the spring semesters, two 3-credit hour courses are offered, with each course taught on five Saturdays from 9:00 am-4:30 pm for a total of 10 Saturdays distributed throughout the semester. During each of two summer semesters, one 3-

credit hour course is offered, taught on five Saturdays from 9:00 am-4:30 pm distributed throughout the summer semester (mid-May through mid-August).

Nine cycles have been successfully offered since the program's inception in September 1990, with a tenth one planned for fall 2004. Below are the start dates and enrollments for the last five cycles:

CYCLE #10

Start date: Fall 2004

Enrollment: 25

CYCLE #9

Start date: Spring 2002

Enrollment: 32

CYCLE #8

Start date: Summer 2000

Enrollment: 18

CYCLE #7

Start date: Fall 1998

Enrollment: 17

CYCLE #6

Start date: Spring 1996

Enrollment: 32

II. CONCEPTUAL FRAMEWORK

Programs shall demonstrate a commitment to:

- (a) Preparing candidates to be education leaders who understand child and adolescent development and learning and who focus on student achievement, including meeting State learning standards;*
- (b) Recruiting candidates from groups historically underrepresented in educational leadership; and*
- (c) Preparing candidates to be education leaders who demonstrate the following nine essential characteristics of effective leaders:*

- (1) Leaders know and understand what it means and what it takes to be a leader;*
- (2) Leaders have a vision for school that they constantly share and promote;*
- (3) Leaders communicate clearly and effectively;*
- (4) Leaders collaborate and cooperate with others;*
- (5) Leaders persevere and take the long view;*
- (6) Leaders support, develop and nurture staff;*
- (7) Leaders hold themselves and others responsible and accountable;*
- (8) Leaders never stop learning and honing their skills; and*
- (9) Leaders have the courage to take informed risks.*

There are three essential ingredients in a successful educational leadership training program including:

Knowledge – Knowledge has been thoroughly outlined in ASBOI (Association of School Business Officials International), NYSASBO (New York State Association of School Business Officials), and SED documents. This knowledge has been incorporated into the program’s course syllabi.

Skills – Educational leaders must have the skills to apply this knowledge in practical, real-life settings. Numerous opportunities for real-life applications are provided throughout the program.

Motivation – Educational leaders must make a commitment to applying this wide array of knowledge to a variety of conditions and challenges in schools.

The Department recognizes the diverse backgrounds of its candidates and focuses on extending this candidate knowledge and skill base through formal and informal pre-assessment, required and optional reading, written assignments, practical applications, group and individual presentations, and self-analysis. Adult learners are respected for their experience and are expected to engage in dialogues sharing those experiences. Teamwork, team leadership, and collaborative problem-solving occur in all the courses.

Aspiring school business administrators enter the CAS Program in School Business Administration with a wide variety of personal and professional experiences from schools, private industry, governments, and not-for-profit organizations. They are adult learners whose unique backgrounds must be molded into the school business leadership role. The students are offered several leadership models drawn from a variety of disciplines and are required to reflect upon all elements of these models as they progress toward selecting those components that best fit their own personal styles and backgrounds.

Although a common core of outcomes is required as defined in syllabi objectives, instructors are given latitude in how they achieve these objectives. It is recognized that cultural mores, community needs, and history will each have an effect on the role a school business leader must play.

Aspiring school business administrators must also recognize the historical context of administrative roles while anticipating that the current role may well change during their tenure. The need for continued study is self-evident. Candidates must demonstrate flexibility while continually assessing community/client needs and keeping abreast of current research, trends, and technologies.

Finally, it is believed that all candidates must demonstrate an ability to work collaboratively with all constituents, gather and evaluate evidence, solve problems, make decisions, anticipate needs, and allocate resources to achieve both short- and long-term goals.

Three primary efforts are directed at recruiting underrepresented candidates specifically in the city of Rochester. Many of the program’s courses are offered at SUNY Brockport’s MetroCenter in downtown Rochester where extensive advertising occurs. The Department participates in an annual career day sponsored by the College held in downtown Rochester. Finally, the Program Coordinator has professional relationships with individuals working in the central offices of the Buffalo City School District, the Rochester City School District, and the Syracuse City School District; these contacts know of the SDBL program and its reputation and frequently recommend candidates.

III. EXTERNAL RELATIONSHIPS

Programs shall establish and maintain formal external relationships with distinguished practitioners and scholars in the field of education and in other fields, such as business or the professions, for the purposes of program development, leadership preparation, program evaluation, and program improvement.

The coordinator of the program interacts with the field in a variety of ways. Over the years, she has assisted numerous school districts in their search for a school business administrator. This has included the Coordinator helping the superintendent crystallize selection criteria, helping to write the vacancy notice, disseminating the vacancy notice via the SBA Listserve (which goes to all

current students and graduates of the SBA Program), and supplying a list of interview and extemporaneous writing questions. Once the superintendent has narrowed the candidate pool, the Program Coordinator is called upon to act as a reference for the candidates and to help match the right candidate to the position. The Program Coordinator provides all of these services gratis to superintendents. Sample school districts where the Program Coordinator has contributed to the search process include Avon Central School District, Liverpool Central School District, Odessa-Montour Central School District, and Owen D. Young Central School District (in the time period from 7/1/03 – 3/1/04).

The Program Coordinator is in constant communication with practicing superintendents, school business officials, and directors of personnel regarding the relevancy and currency of course content as well as delivery methods.

The Program Coordinator is frequently in contact with program graduates who have been in their new SBA jobs for a year to solicit program feedback. The questions the Coordinator asks are, “Is there anything that has crossed your desk in the past year that you didn’t know how to do? Is there anything that the program failed to prepare you for? Are there any gaps in the program?”

Advertisement of the program tends to be word-of-mouth. Prospective students are usually recommended by a superintendent, a central office administrator, and/or a graduate of the program. Also, superintendents frequently contact the Program Coordinator with the names of individuals they would like to nominate for entrance into the program.

The Program Coordinator is a member of the Association of School Business Officials (ASBO International) and New York State ASBO. She is frequently asked to speak at their conferences and attends their functions. This linkage helps the SBA coordinator stay current and also interface with practitioners.

Finally, the Department has a formal articulation agreement with the Department of Educational Administration of the Margaret Warner Graduate School at the University of Rochester to help Brockport students enter and complete an Ed.D. in educational administration from that institution.

IV. OTHER REQUIREMENTS

- (a) Programs shall ensure that candidates complete two clock hours of coursework or training in school violence prevention and intervention, in accordance with section 3004 of the Education Law. Such course work or training shall include but not be limited to, study in the warning signs within a developmental and social context that relate to violence and other troubling behaviors in children; the statutes, regulations and policies relating to a safe nonviolent school climate; effective classroom management techniques and other academic supports that promote a nonviolent school climate and enhance learning; the integration of social and problem solving skill development for students within the regular curriculum; intervention techniques designed to address a school violence situation; and how to participate in an effective school/community referral process for students exhibiting violent behavior.*
- (b) Programs shall ensure that candidates complete two clock hours of coursework training regarding the identification and reporting of suspected child abuse or maltreatment, in accordance with the requirements of sections 3003 and 3004 of the Education Law.*

The two-hour coursework component for training in school violence prevention and intervention is housed in EDA 890 Site Management for School Business Administrators. Instructional time is built into that course during which the training is provided to all students. The curriculum used for that training is “Setting the Stage for Safer Schools: A Two-Hour Violence Prevention Training for Persons Seeking Certification in New York State,” which was jointly developed by the New York State Center for School Safety (NYSCSS) and the NYSCSS Satellite Office at the Sullivan County BOCES. Students in attendance at that session must sign an official roster with their name and social security number. Upon completion of the session, the roster is returned to the Department of Educational Administration; the list of students is transmitted to the Certification and Licensure Office at SUNY Brockport. Each of those students then has an official notation made to their SUNY Brockport graduate transcript which verifies they have completed the two-hour training component.

The two-hour coursework component for training in the identification and reporting of suspected child abuse or maltreatment is housed in EDA 890 Site Management for School Business Administrators. Instructional time is built into that course during which time the training is provided to all students. The curriculum used for that training is the New York State syllabus provided by the State Education Department entitled “The Identification and Reporting of Child Abuse and Maltreatment.” Students in attendance at that session must sign an official roster with their name and social security number. Upon completion of the session, the roster is returned to the Department of Educational Administration; the list of students is transmitted to the Certification and Licensure Office at SUNY Brockport. Each of those students then has an official notation made to their SUNY Brockport graduate transcript, which verifies they have completed the two-hour training component.

V. ADMISSIONS REQUIREMENTS

- (a) *Programs shall require candidates to hold a baccalaureate from an accredited institution of higher education or from an institution authorized by the Board of Regents to confer degrees;*
- (b) *Programs shall require candidates to demonstrate the potential to become education leaders possessing the nine essential characteristics of effective leaders as a result of their prior experiences that are evaluated using criteria established by the program and uniformly applied.*

Admissions requirements for the CAS degree in School Business Administration are as follows:

1. An earned master's degree;
2. A graduate grade point average of 3.0 or higher;
3. An individual interview with the Program Coordinator;
4. Attendance at a program meeting, where the logistics, policies, and culture of the program are explained.

VI. PROJECTED ENROLLMENT FOR FALL 2004

The enrollment of SDBL students is as follows:

Fall 2004: 32

Spring 2003: 22
 Fall 2003: 23

VII. FIVE YEAR PROJECTED ENROLLMENT

We currently estimate that enrollment will remain stable for the near future.

VIII. CREDIT FOR PRIOR LEARNING

Programs may grant graduate credit for prior learning, as determined through assessment, and develop individual plans of study to assist candidates in acquiring all prescribed knowledge and skills. Programs shall state on a candidate's academic record all graduate credit that the program has granted for prior learning determined to be equivalent to a content requirement for the program.

The Department of Educational Administration does not grant credit for prior learning.

IX. CONTENT REQUIREMENTS - MATRIX

The matrix is a brief, visual, illustration of the relationship between Regents content requirements and objectives in required courses in the School District Business Leader program. The left hand column lists Regents content requirements; required SDBL courses are listed across the top of the matrix. An X in a cell means that the selected course has learning objectives that meet the corresponding Regents requirement.

All objectives referenced in this matrix are presented in the narrative portion of Content Requirements (X).

SCHOOL DISTRICT BUSINESS LEADERSHIP

COURSE

	656	691	692	693	890	891	892	893	894	897	897/898
Requirement											
(a) Sustain conditions	X	X	X	X	X	X	X	X	X		X

(b) Policies and regulations	X	X	X		X	X	X	X	X	X	X
(c) Finances	X	X	X	X		X	X	X	X	X	X
(d) Personnel	X	X	X			X	X	X	X	X	X
(e) Support services		X	X	X		X	X		X	X	X
(f) Strategic planning	X	X	X	X	X	X		X	X	X	X
(g) Presenting data	X	X	X		X			X	X		X
(h) Diversity	X	X		X	X			X			X
(i) People skills	X	X			X		X		X		X

X. CONTENT REQUIREMENTS - NARRATIVE

Content requirements specified in the document, “**New Requirements for Educational Leadership Programs, 8NYCRR 52.21(c)**” are presented in *bold italics*. A brief statement of how these requirements are being met includes a course number, course description and rationale listed in the course syllabi¹ that specifically address the issue(s)² referenced.

(a) Create and sustain financial and operational conditions within a district that enable all students to meet State learning standards and all staff to serve effectively in achieving that objective;

School District Business Leaders (SDBLs) need to manage a variety of areas to help teachers and principals ensure that all students are meeting State learning standards. This includes everything from monitoring finances so that necessary supplies and equipment can be purchased, to getting students to school on time, to making sure the buildings are clean and warm -- and all this requires the SDBL know and understand the instructional goals of the district so that all of his/her actions can be undertaken to further these goals.

EDA 656 Personnel Administration

- A. Develop job descriptions which include position qualifications, relationships, and responsibilities stated in measurable and achievable terms.
- B. Develop and administer a current and accurate personnel records system.
- C. Develop a recruitment plan to fill vacant positions.
- D. Involve appropriate staff in the selection process.
- E. Seek the greatest number of candidates from all sources for all positions.
- F. Screen initial application forms, letters of inquiry, and resumes to eliminate candidates not meeting the job description.
- G. Select from the applicant pool the candidates to be interviewed and/or observed only after reviewing transcripts, application forms, and letters of reference.

¹ Course description and rationale in the NCATE format are included in Appendix D.

² Content requirements listed in the New Requirements often require multiple performances by administrative leadership candidates and course objectives may cover several areas.

- H. Use interviewing and observation techniques which will provide information on how well the candidate meets the requirement of the job description.
- I. Select candidates regardless of race, creed, national background, sex, age, or physical handicap.
- J. Develop and administer a plan for effective orientation of new non-instructional personnel.
- K. Use appraisal processes that safeguard employee rights.
- L. Keep detailed records on the progress of probationary staff and give early warning when performance is such that dismissal may be indicated.
- M. Apply procedures for progressive discipline of employees with unsatisfactory performance.
- N. Apply correct legal procedures for dismissal of probationary and tenured certificated and Civil Service staff.
- U. Formulate compensation plans for personnel.

EDA 691 Principles and Practices of Budgeting

- D. Build an expenditure plan that enables all students to meet State learning standards and that meets district needs.
- E. Build a revenue budget that maximizes revenues and supports the expenditures needed to fulfill the instructional mission of the district.
- F. Manage the revenue and the expenditure budgets to meet legal limitations.
- G. Manage fund balance to smooth taxes and to accomplish selected district goals.
- J. Secure local support of the budget by educating the public using legal procedures.
- K. If necessary, manage a contingent budget to meet legal limitations.

EDA 692 Design and Use of Microcomputers Systems for School Administrators

- D. Use technology to facilitate communication.
- F. Supervise educational technology, including planning and financing computer systems.

EDA 693 Administration of Support Services

- A. Develop a systems perspective of school business administration.
- F. Understand services provided to students with handicapping conditions and the impact on district finances.

EDA 890 Issues in Site Management for School Business Administrators

- A. Evaluate the system of a school district and apply techniques to enhance leadership effectiveness in that organization:
 1. Diagnose the culture of a school district and the relationship of leadership to organizational health.
 2. Identify the components of the social system of the school and the role relationships within a district.
- 3. Articulate a team leadership approach to management.

4. Compare and contrast organizational and personal goals and conflicts arising from the differences.
 5. Use fundamental conflict resolution strategies.
 6. Compare alternative ways of assessing organizational effectiveness.
 7. Explain trends in changing role relationships in relation to site autonomy, empowerment, and professionalism.
- B. Apply effective elements of human relations and principles of leadership and group dynamics to team-building strategies:
1. Identify leadership styles and their implications for specific contexts.
 2. Function as a supportive member of a group.
 3. Apply consensus building strategies and tactics to a specific problem.
 4. Apply techniques of conflict resolution.
- C. Use appropriate managerial skills:
1. Communicate effectively both orally and in writing.
 2. Listen intently and respond intelligently to the presentations of others.
 3. Develop a system for decision-making that assures maximum input and consideration of all viable options.
 4. Synthesize leadership training skills and knowledge of organizational dynamics in planning for change.
- D. Know the functioning of the teaching-learning process:
1. Understand the job duties of teachers.
 2. Understand the job duties of principals.
 3. Understand the teaching-learning process and the elements of good teaching.
 4. Evaluate the district's strategic plan and its impact on district finances.
 5. Know student safety procedures as per the New York State required training on child abuse and SAVE legislation.

EDA 891 Facilities Planning and Management

- A. Plan a capital project.
 - C. Execute the capital project.
- E. Supervise the operation and maintenance function.
- F. Know post 9/11 insurance and safety regulations affecting construction and operation of school buildings.
- G. Ensure the health and safety of the district's buildings, their environment, and their occupants.
- I. Implement a program of energy management for the district.

EDA 892 Legal Issues for School Business Administrators

- A. Apply appropriate legal statutes and case law to all aspects of school business administration.

EDA 893 School Finance and Revenue Management

- A. Understand the social and economic benefits of education.
- B. Understand and explain economic, social, and political factors affecting the financing of education.
- C. Analyze the various sources of revenue and current proposals to support the educational effort.

- D. Understand the role of federal, state, and local governments and communities in the support of public education.
- E. Know the various statutes pertaining to state aid for education in New York State.
- F. Understand the role of the government in education and be acquainted with current programs of federal aid.
- G. Forecast revenues and engage in long-term financial planning.
 - I. Accurately project cash flows.
- K. Understand the responsibilities of public schools to provide financial support to non-public schools.

EDA 894 Public School Accounting

- B. Properly recognize and record all financial transactions of all funds in the accounting books of a school district.
- C. Produce appropriate financial statements for all funds that monitor and manage the financial resources of the district.
- D. Interpret financial statements to the board of education, the public, and other school district stakeholders to assist them in implementing, monitoring, and evaluating the financial implications of the district's strategic plan and instructional goals.

EDA 897 Practicum and EDA 898 Internship Field Experiences

- A-1. Produce one monthly Treasurer's Report for the general fund.
- A-2. Produce one end-of-month trial balance for the general fund ledger accounts and reconcile the accounts if they do not balance.
- A-3. Produce at least one additional financial statement for the general fund.
- A-4. Produce an additional interim of annual report of district financial status for two different funds other than the general fund (total of two reports).
- B-2. Calculate estimated end-of-year projected annual expenditures and fund balance for each line item in the general fund appropriations budget (must be done any time from November – February).
- B-3. Calculate estimated end-of-year projected actual revenues and fund balance for each line item in the general fund revenue budget (must be done any time from November – February).
- B-4. Calculate the total estimated year-end fund balance for the general fund (must be done any time from November – February).
- B-5. Investigate the use of reserve funds for managing fund balance.
- C-1. Prepare a cash flow statement for a minimum time period of six months.
- C-2. Determine the amount of funds and time period for at least one investment or borrowing vehicle.
- C-3. Secure quotations from financial institutions for at least one investment or borrowing vehicle.
- C-4. Recommend the best alternative for the district from the quotations secured above that meets legal requirements and local board policies.
- C-5. Verify collateral for the district's investment(s).
- E-1. Perform, under the direction of the payroll clerk, some calculations necessary to produce the payroll for one pay period.

- E-2. Explain to at least one district employee the various components of compensations found on a pay stub and how they were calculated.
- E-3. Complete a project in one contract administration task area (e.g., collect data and write a report on one or more fringe benefits currently provided by the district; develop bid specifications and participate in the selection of a fringe benefit provider; develop procedures for the evaluation and proper management of a selected fringe benefit).
- E-4. Write the first draft of a district response letter to at least one grievance.
- F-1. Calculate a projection of future building state aid for the life of the district's projects.
- F-2. Calculate a projection of future debt service payments for the life of the district's projects.
- H-1. Act as a resource person and facilitator to the cafeteria manager in one food service task area (e.g., develop menus to meet state and federal requirements and to maximize donated commodities and current inventories; develop new techniques to promote sales and to market the school lunch and/or breakfast program; undertake the CRE or the SMI review; undertake the official school district review of free and reduce price meal applications; update current food inventories and order additional purchased and donated food items; develop bid specifications and participate in the selection of good and services; implement a school breakfast program).
- I-1. Attend at least one employee right-to-know and toxic substance seminar or one building safety meeting.
- I-2. Complete a project in at least one health and safety task area (e.g., write board policies and administrative regulations regarding SAVE, students and staff with contagious diseases, or environmental issues like smoking, PCBs, radon, etc.; plan and implement a drill of the district's emergency preparedness plan or evacuation procedures; assess the district's current state of compliance for asbestos, PCBs, underground storage tanks, hazardous chemicals, lead, indoor air quality, recycling, electromagnetic force field, playgrounds, or athletics, etc.).
- J-1. Complete a project in one regular school curriculum and instruction task area (e.g., participate actively on an instructionally-related group such as the PTA or a curriculum committee; participate in a teacher staff development program designed to improve instructional strategies; contribute to a K-12 curriculum guide; shadow a building principal for a day).
- J-2. Complete a project in one special education curriculum and instruction task area (e.g., attend a CSE or CPSE meeting; attend a special education impartial hearing; complete STAC forms).
- J-3. Write a report summarizing key points of the district's strategic plan and analyze its impact on district finances.
- K-1. Complete a project in one insurance task area (e.g., investigate and process a claim involving student injury, employee injury, or property damage; review the district's insurance package, report findings, and make recommendations; write specifications for insurance quotations from new carriers; review the district's loss record – covered losses and deductibles – for a selected period, report findings, and make recommendations).

- L-1. Act as a resource person and facilitator to the director of building and grounds in one operations and maintenance task area (e.g., develop a comprehensive maintenance plan; develop bids for electricity or natural gas; develop staffing plans; determine energy budgets; develop a recycling program; develop a preventative maintenance program; secure energy grants).
- M-3. Recruit and select a candidate for a vacancy.
- M-4. Establish and maintain a positive and constructive relationship with the chief school officer.
- M-5. Treat confidential information in an appropriate manner.
- M-6. Establish and maintain a positive and constructive relationship with administrators, teachers, support staff, and community members.
- M-7. Encourage positive morale among the business office staff.
- O-1. Perform the necessary calculations and complete three different state aid forms in three different areas (e.g., transportation aid, building aid, SA-19, federal aid).
- O-2. Calculate the revenue to be earned in two of the following four areas: Medicaid, non-resident tuition, STAC forms, health services.
- O-3. Calculate the school district tax spread.
- P-1. Attend three regular meetings of the board of education of the Practicum school district during the Practicum field experience.
- P-2. Attend three regular meetings of the board of education of the Internship school district during the Internship.
- P-3. Attend a regular meeting of the board of education in each of two different school districts that are culturally different from the student's own (urban, rural, suburban).
- Q-1. Complete a project in two different supply and fixed asset management task areas (e.g., approve at least ten requisitions; write bid specifications and legal notices; select the lowest responsible bidder among submitted bids; plan and implement a program for the maintenance and repair of equipment; evaluate and dispose of surplus property via trash, bid, auction, etc.; update inventories; update the general fixed assets account group).
- R-1. Act as a resource person and facilitator to the director of transportation in at least one transportation task area (e.g., develop bus routes and schedules; develop a plan for fleet management and maintenance; plan and implement staff training programs; write legal documents and bid specifications for bus purchases; write bid specifications for contracted bus services; investigate the installation of video cameras).

(b) Identify, develop, and endorse organizational and administrative policies and procedures for the district;

SDBL students are able to evaluate the functions within their domain for efficiency and effectiveness. If any of these functions are found lacking, the students can determine if there is need for new or modified board policy and can write the policy and associated administrative regulations for their adoption and approval. They also learn how to disseminate and endorse policies and regulations.

EDA 656 Personnel Administration

- O. Identify personnel policy issues requiring resolution.
- P. Develop and evaluate alternatives when resolving a policy (regulation) issue.
- Q. Effectively present management's position in a grievance hearing.
- R. Participate as a member of management's team in the entire process of negotiations.

EDA 691 Principles and Practices of Budgeting

- H. Manage revenue and the expenditure budgets to meet legal limitations.

EDA 692 Design and Use of Microcomputers Systems for School Administrators

- I. Supervise educational technology, including planning and financing computer systems.
- J. Know and use Internet sites relevant to school business administration to stay current on hot topics, new legal requirements, and innovative practices.

EDA 693 Administration of Support Services

- F. Know the grant-writing process to help maximize district revenues.
- G. Understand services provided to students with handicapping conditions and the impact on district finances.

EDA 890 Issues in Site Management for School Business Administrators

- A. Evaluate the system of a school district and apply techniques to enhance leadership effectiveness in that organization:
 - 1. Diagnose the culture of a school district and the relationship of leadership to organizational health.
 - 2. Identify the components of the social system of the school and the role relationships within a district.
 - 4. Compare and contract organizational and personal goals and conflicts arising from the differences.
 - 6. Compare alternative ways of assessing organizational effectiveness.
- C. Use appropriate managerial skills:
 - 3. Develop a system for decision-making that assures maximum input and consideration of all viable options.
 - 4. Synthesize leadership training skills and knowledge of organizational dynamics in planning for change.

EDA 891 Facilities Planning and Management

- E. Supervise the operation and maintenance function.
- F. Know post 9/11 insurance and safety regulations affecting construction and operation of school buildings.
- H. Properly dispose of surplus property.
- J. Apply appropriate requirements for use of school facilities by outside groups.

EDA 892 Legal Issues for School Business Administrators

- A. Apply appropriate legal statutes and case law to all aspects of school business administration.
- B. Use the services of the school attorney appropriately.

EDA 893 School Finance and Revenue Management

- J. Use borrowing and investing procedures to manage cash efficiently and effectively.
- K. Understand the responsibilities of public schools to provide financial support to non-public schools.

EDA 894 Public School Accounting

- L. Prepare for the external audit and understand and interpret to the board of education, the public, and other school district stakeholders the procedures involved and the resulting reports.
- M. Develop and implement internal controls.
- N. Minimize opportunities for fraud and embezzlement in the school district.

EDA 897 Practicum in School Business Administration

- C. Course work:
 - 5. Perform the duties of the district clerk.
 - 6. Prepare for board meetings.
 - 7. Contribute to the writing of the board agenda appropriately and in legally correct format.
 - 9. Write all other board motions in legally correct format.
 - 10. Participate in board meetings actively and appropriately.
 - 11. Write board meeting minutes in legally correct format.
 - 12. Identify areas in need of policy revision or addition.
 - 13. Correctly write board policies, administrative regulations, goals, and objectives.

EDA 897 Practicum and EDA 898 Internship Field Experiences

- I-2. Complete a project in at least one health and safety task area (e.g., write board policies and administrative regulations regarding SAVE, students and staff with contagious diseases, or environmental issues like smoking, PCBs, radon, etc.; plan and implement a drill of the district's emergency preparedness plan or evacuation procedures; assess the district's current state of compliance for asbestos, PCBs, underground storage tanks, hazardous chemicals, lead, indoor air quality, recycling, electromagnetic force field, playgrounds, or athletics, etc.).
- M-4. Establish and maintain a positive and constructive relationship with the chief school officer.
- N-1. Read and discuss the external auditor's annual report with the school business administrator.
- P-1. Attend three regular meetings of the board of education of the Practicum school district during the Practicum field experience.

- P-2. Attend three regular meetings of the board of education of the Internship school district during the Internship.
- P-3. Attend a regular meeting of the board of education in each of two different school districts that are culturally different from the student's own (urban, rural, suburban).
- P-4. Make a formal oral presentation to the board of education (preferred) or a community group.
- P-5. Write a substantive memo to the board of education from self or on behalf of others.
- P-6. Write two board policies and administrative regulations.

(c) Effectively and ethically manage the financial resources of a district, including but not limited to identifying revenue sources; understanding the impact of economic and financial markets upon districts; forecasting district expenditures; applying cash management procedures and generally accepted accounting principles; developing a financial model to monitor district finances;

SDBL students learn about and practice techniques to monitor and forecast school district resources, including revenue budgeting and management, expenditure budgeting and management, fund balance management and the use of GAAP (Generally Accepted Accounting Principles) for all school district funds.

EDA 656 Personnel Administration

- U. Formulate compensation plans for personnel.

EDA 691 Principles and Practices of Budgeting

- O. Know the theories of budget development.
- P. Apply concepts of budget increases.
- Q. Read and understand a school district budget based on the New York State Uniform System of Accounts.
- R. Build an expenditure plan that enables all students to meet State learning standards and that meets district needs.
- S. Build a revenue budget that maximizes revenues and supports the expenditures needed to fulfill the instructional mission of the district.
- T. Manage revenue and the expenditure budgets to meet legal limitations.
- U. Manage fund balance to smooth taxes and to accomplish selected district goals.
- V. Prepare all legally required documents for a budget referendum, including a contingent budget.
- W. Hold a budget hearing according to legal requirements.
- X. Secure local support of the budget by educating the public using legal procedures.
- Y. If necessary, manage a contingent budget to meet legal limitations.

EDA 692 Design and Use of Microcomputers Systems for School Administrators

- B. Use the Microsoft Office suite of programs for performing business office functions.

- C. Efficiently and effectively manipulate and present financial data in multiple formats using Excel.
- D. Use technology to facilitate communications.
- E. Use Power Point to enhance formal presentations to the public.
- G. Know and use Internet site relevant to school business administration to stay current on hot topics, new legal requirements, and innovative practices.

EDA 693 Administration of Support Services

- F. Understand services provided to students with handicapping conditions and the impact on district finances.
- G. Know the grant-writing process to help maximize district revenues.

EDA 891 Facilities Planning and Management

- A. Plan a capital project.
- B. Receive state and local approval of the project.
- C. Execute the capital project.
- D. Complete all required paperwork for the project, including state aid forms.

EDA 892 Legal Issues for School Business Administrators

- A. Apply appropriate legal statutes and case law to all aspects of school business administration.

EDA 893 School Finance and Revenue Management

- A. Understand the social and economic benefits of education.
- B. Understand and explain economic, social, and political factors affecting the financing of education.
- C. Analyze the various sources of revenue and current proposals to support the educational effort.
- D. Understand the role of federal, state, and local governments and communities in the support of public education.
- E. Know the various statutes pertaining to state aid for education in New York State.
- F. Understand the role of the government in education and be acquainted with current programs of federal aid.
- G. Forecast revenues and engage in long-term financial planning.
- H. Apply taxation concepts and practices, including the calculation of tax rates for towns in a school district.
- I. Accurately project cash flows.
- J. Use borrowing and investing procedures to manage cash efficiently and effectively.
- K. Understand the responsibilities of public schools to provide financial support to non-public schools.

EDA 894 Public School Accounting

- A. Know, understand, and apply governmental GAAP (generally accepted accounting principles) for school districts.
- B. Properly recognize and record all financial transactions of all funds in the accounting books of a school district.
- C. Produce appropriate financial statements for all funds that monitor and manage the financial resources of the district.
- E. Comply with state and federal regulations for financial reporting.
- L. Prepare for the external audit and understand and interpret to the board of education, the public, and other school district stakeholders the procedures involved and the resulting reports.
- M. Develop and implement internal controls.
- N. Minimize opportunities for fraud and embezzlement in the school district.

EDA 897 Practicum in School Business Administration

- C. Course work:
 - 15. Plan elections and referenda.
 - 16. Include building principals in the planning of elections and referenda.
 - 17. Execute all legally required procedures and documents prior to elections and referenda.
 - 18. Practice positive community relationships during elections and referenda.
 - 19. Execute all legally required procedures and documents after elections and referenda.

EDA 897 Practicum and EDA 898 Internship Field Experiences

- A-1. Produce one monthly Treasurer's Report for the general fund.
- A-2. Produce one end-of-month trial balance for the general fund ledger accounts and reconcile the accounts if they do not balance.
- A-3. Produce at least one additional financial statement for the general fund.
- A-4. Produce an additional interim or annual report of district financial status for two different funds other than the general fund (total of two reports).
- B-1. Calculate the percent of total and the change over last year's budgeted amounts for the general fund budget total and each of the following category totals: general support, instruction, transportation, community service, employee benefits, debt service, and interfund transfers.
- B-2. Calculate estimated end-of-year projected annual expenditures and fund balance for each line item in the general fund appropriations budget (must be done any time from November – February).
- B-3. Calculate estimated end-of-year projected actual revenues and fund balance for each line item in the general fund revenue budget (must be done any time from November – February).
- B-4. Calculate the total estimated year-end fund balance for the general fund (must be done any time from November – February).
- B-5. Investigate the use of reserve funds for managing fund balance.
- B-6. Prepare for approval by the school business official at least three budget transfers.
- C-1. Prepare a cash flow statement for a minimum time period of six months.

- C-2. Determine the amount of funds and time period for at least one investment or borrowing vehicle.
- C-3. Secure quotations from financial institutions for at least one investment or borrowing vehicle.
- C-4. Recommend the best alternative for the district from the quotations secured above that meets legal requirements and local board policies.
- C-5. Verify collateral for the district's investment(s).
- F-1. Calculate a projection of future building state aid for the life of the district's projects.
- F-2. Calculate a projection of future debt service payments for the life of the district's projects.
- N-1. Read and discuss the external auditor's annual report with the school business administrator.
- O-1. Perform the necessary calculations and complete three different state aid forms in three different areas (e.g., transportation aid, building aid, SA-19, federal aid).
- O-2. Calculate the revenue to be earned in two of the following four areas: Medicaid, non-resident tuition, STAC forms, health services.
- O-3. Calculate the school district tax spread.

(d) Administer employment agreements and financial and operational resources in accordance with state and federal laws and regulations, including collective bargaining; manage and evaluate district payroll operations;

SDBL students are equipped with all the knowledge and tools to act as a director of personnel and to effectively administer the logistics of the human resource function.

EDA 656 Personnel Administration

- Z. Develop job descriptions which include position qualifications, relationships, and responsibilities stated in measurable and achievable terms.
- AA. Develop and administer a current and accurate personnel records system.
- BB. Develop a recruitment plan to fill vacant positions.
- CC. Involve appropriate staff in the selection process.
- DD. Seek the greatest number of candidates from all sources for all positions.
- EE. Screen initial application forms, letters of inquiry, and resumes to eliminate candidates not meeting the job description.
- FF. Select from the applicant pool the candidates to be interviewed and/or observed only after reviewing transcripts, application forms, and letters of reference.
- GG. Use interviewing and observation techniques which will provide information on how well the candidate meets the requirements of the job description.
- HH. Select candidates regardless of race, creed, national background, sex, age, or physical handicap.
- II. Develop and administer a plan for effective orientation of new non-instructional personnel.
- JJ. Use appraisal processes that safeguard employee rights.

- KK. Keep detailed records on the progress of probationary staff and give early warning when performance is such that dismissal may be indicated.
- LL. Apply procedures for progressive discipline of employees with unsatisfactory performance.
- MM. Apply correct legal procedures for dismissal of probationary and tenured certificated and Civil Service staff.
- NN. Identify personnel policy issues requiring resolution.
- OO. Develop and evaluate alternatives when resolving a policy (regulation) issue.
- PP. Effectively present management's position in a grievance hearing.
- QQ. Participate as a member of management's team in the entire process of negotiations.
- RR. Accept the process of negotiations as a way of achieving mutual agreement.
- SS. Develop proposals and counter-proposals that achieve desired goals.
- TT. Formulate compensation plans for personnel.

EDA 691 Principles and Practices of Budgeting

- D. Build an expenditure plan that enables all students to meet State learning standards and that meets district needs.
- E. Manage revenue and the expenditure budgets to meet legal limitations.

EDA 692 Design and Use of Microcomputers Systems for School Administrators

- D. Use technology to facilitate communication
- G. Know and use Internet sites relevant to school business administration to stay current on hot topics, new legal requirements, and innovative practices.

EDA 891 Facilities Planning and Management

- E. Supervise the operation and maintenance function.

EDA 892 Legal Issues for School Business Administrators

- A. Apply appropriate legal statutes and case law to all aspects of school business administration.

EDA 893 School Finance and Revenue Management

- I. Accurately project cash flows.

EDA 894 Public School Accounting

- A. Know, understand, and apply governmental GAAP (generally accepted accounting principles) for school districts.
- D. Comply with state and federal regulations for financial reporting.
- H. Produce payrolls and provide reports on salaries and fringe benefits.
- J. Select an appropriate individual to be the district treasurer and properly supervise the duties of that position.

- C. Course work:
 - 8. Write board motions for personnel actions in legally correct format.

EDA 897 Practicum and EDA 898 Internship Field Experiences

- D-1. Prepare a set of supporting data for the district team.
- D-2. Write in formal contract language two proposals or counter-proposals for the district team (not for monetary issues).
- E-1. Perform, under the direction of the payroll clerk, some calculations necessary to produce the payroll for one pay period.
- E-2. Explain to at least one district employee the various components of compensations found on a pay stub and how they were calculated.
- E-3. Complete a project in one contract administration task area (e.g., collect data and write a report on one or more fringe benefits currently provided by the district; develop bid specifications and participate in the selection of a fringe benefit provider; develop procedures for the evaluation and proper management of a selected fringe benefit).
- E-4. Write the first draft of a district response letter to at least one grievance.
- H-1. Act as a resource person and facilitator to the cafeteria manager in one food service task area (e.g., develop menus to meet state and federal requirements and to maximize donated commodities and current inventories; develop new techniques to promote sales and to market the school lunch and/or breakfast program; undertake the CRE or the SMI review; undertake the official school district review of free and reduce price meal applications; update current food inventories and order additional purchased and donated food items; develop bid specifications and participate in the selection of good and services; implement a school breakfast program).
- M-1. Write at least one substantive memo to a group of staff members from self or on behalf of others.
- M-2. Write three board motions regarding personnel matters.
- M-3. Recruit and select a candidate for a vacancy.
- M-6. Establish and maintain a positive and constructive relationship with administrators, teachers, support staff, and community members.
- M-7. Encourage positive morale among the business office staff.

(e) Effectively and ethically manage the operational functions of a district including but not limited to: developing data-driven facilities plans; managing and tracking inventories, equipment, capital assets; identifying, assessing, and communicating a district risk management program;

SDBL students learn a systems perspective of their position and the role they play in supporting the teaching-learning process. This includes the ability to manage food service operations, the transportation department, supplies and inventories and, the insurance program.

EDA 691 Principles and Practices of Budgeting

- D. Build an expenditure plan that enables all students to meet State learning standards and that meets district needs.
- F. Manage revenue and the expenditure budgets to meet legal limitations

EDA 692 Design and Use of Microcomputers Systems for School Administrators

- C. Efficiently and effectively manipulate and present financial data in multiple formats using Excel.
- F. Supervise educational technology, including planning and financing computer systems.
- G. Know and use Internet sites relevant to school business administration to stay current on hot topics, new legal requirements, and innovative practices.

EDA 693 Administration of Support Services

- A. Develop a systems perspective of school business administration.
- B. Manage the food service operations of the district to ensure that students receive nutritious meals that comply with federal standards.
- C. Manage the transportation department of the district to ensure efficient operations and the safety of students.
- D. Manage the supply management and inventory system of the district to ensure that there are adequate supplies, materials, and equipment to support the teaching-learning process.
- E. Manage the insurance program of the district to minimize risk and to ensure the safety of the buildings and their occupants.

EDA 891 Facilities Planning and Management

- A. Plan a capital project.
- B. Receive state and local approval of the project.
- C. Execute the capital project.
- D. Complete all required paperwork for the project, including state aid forms.
- E. Supervise the operation and maintenance function.
- F. Know post 9/11 insurance and safety regulations affecting construction and operation of school buildings.
- G. Ensure the health and safety of the district's buildings, their environment, and their occupants.
- H. Properly dispose of surplus property.
- I. Implement a program of energy management for the district.
- J. Apply appropriate requirements for use of school facilities by outside groups.

EDA 892 Legal Issues for School Business Administrators

- A. Apply appropriate legal statutes and case law to all aspects of school business administration.
- B. Supervise the process of records management, or in the absence of support personnel, assume the role of the records management officer.
- C. Perform all duties in a lawful and ethical manner.

EDA 894 Public School Accounting

- A. Properly recognize and record all financial transactions of all funds in the accounting books of a school district.
- F. Organize, conduct, and use data from the school district census.
- G. Organize and use data from pupil attendance systems.
- I. Account for capital projects and fixed assets.

EDA 897 Practicum in Educational Leadership

- C. Course work:
 - 5. Perform the duties of the district clerk.
 - 6. Prepare for board meetings.
 - 7. Contribute to the writing of the board agenda appropriately and in legally correct format.
 - 8. Write board motions for personnel actions in legally correct format.
 - 9. Write all other board motions in legally correct format.
 - 11. Identify areas in need of policy revision or addition.
- 15. Plan elections and referenda.
 - 16. Include building principals in the planning of elections and referenda.
- 17. Execute all legally required procedures and documents prior to elections and referenda.
- 18. Practice positive community relationships during elections and referenda.
- 19. Execute all legally required procedures and documents after elections and referenda.

EDA 897 Practicum and EDA 898 Internship Field Experiences

- F-1. Calculate a projection of future building state aid for the life of the district's projects.
- F-2. Calculate a projection of future debt service payments for the life of the district's projects.
- H-1. Act as a resource person and facilitator to the cafeteria manager in one food service task area (e.g., develop menus to meet state and federal requirements and to maximize donated commodities and current inventories; develop new techniques to promote sales and to market the school lunch and/or breakfast program; undertake the CRE or the SMI review; undertake the official school district review of free and reduce price meal applications; update current food inventories and order additional purchased and donated food items; develop bid specifications and participate in the selection of good and services; implement a school breakfast program).
- I-1. Attend at least one employee right-to-know and toxic substance seminar or one building safety meeting.
- I-2. Complete a project in at least one health and safety task area (e.g., write board policies and administrative regulations regarding SAVE, students and staff with contagious diseases, or environmental issues like smoking, PCBs, radon, etc.; plan and implement a drill of the district's emergency preparedness plan or evacuation procedures; assess the district's current state of compliance for asbestos, PCBs, underground storage tanks, hazardous chemicals, lead, indoor air

quality, recycling, electromagnetic force field, playgrounds, or athletics, etc.).

K-1. Complete a project in one insurance task area (e.g., investigate and process a claim involving student injury, employee injury, or property damage; review the district's insurance package, report findings, and make recommendations; write specifications for insurance quotations from new carriers; review the district's loss record – covered losses and deductibles – for a selected period, report findings, and make recommendations).

L-1. Act as a resource person and facilitator to the director of building and grounds in one operations and maintenance task area (e.g., develop a comprehensive maintenance plan; develop bids for electricity or natural gas; develop staffing plans; determine energy budgets; develop a recycling program; develop a preventative maintenance program; secure energy grants).

Q-1. Complete a project in two different supply and fixed asset management task areas (e.g., approve at least ten requisitions; write bid specifications and legal notices; select the lowest responsible bidder among submitted bids; plan and implement a program for the maintenance and repair of equipment; evaluate and dispose of surplus property via trash, bid, auction, etc.; update inventories; update the general fixed assets account group).

R-1. Act as a resource person and facilitator to the director of transportation in at least one transportation task area (e.g., develop bus routes and schedules; develop a plan for fleet management and maintenance; plan and implement staff training programs; write legal documents and bid specifications for bus purchases; write bid specifications for contracted bus services; investigate the installation of video cameras).

(f) Assist in implementing, monitoring, and evaluating a district strategic plan; monitor and assess programs that support instruction; assist with the allocation of resources for instructional programs;

The SDBL Program gives students an understanding of the educational mission and their role in accomplishing that mission. Students learn that the SDBL office exists to provide support for the teaching-learning process in the district.

EDA 656 Personnel Administration

- R. Participate as a member of management's team in the entire process of negotiations.
- T. Develop proposals and counter-proposals that achieve desired goals.
- U. Formulate compensation plans for personnel.

EDA 691 Principles and Practices of Budgeting

- D. Build an expenditure plan that enables all students to meet State learning standards and that meets district needs.
- E. Build a revenue budget that maximizes revenues and supports the expenditures needed to fulfill the instructional mission of the district.
- F. Manage revenue and the expenditure budgets to meet legal limitations.
- G. Manage fund balance to smooth taxes and to accomplish selected district goals.
- J. Secure local support of the budget by educating the public using legal procedures.

EDA 692 Design and Use of Microcomputers Systems for School Administrators

- C. Efficiently and effectively manipulate and present financial data in multiple formats using Excel.
- D. Use technology to facilitate communication.
- F. Supervise educational technology, including planning and financing computer systems.
- G. Know and use Internet sites relevant to school business administration to stay current on hot topics, new legal requirements, and innovative practices.

EDA 693 Administration of Support Services

- UU. Develop a systems perspective of school business administration.
- VV. Manage the food service operations of the district to ensure that students receive nutritious meals that comply with federal standards.
- WW. Manage the transportation department of the district to ensure efficient operations and the safety of students.
- XX. Manage the supply management and inventory system of the district to ensure that there are adequate supplies, materials, and equipment to support the teaching-learning process.
- YY. Manage the insurance program of the district to minimize risk and to ensure the safety of the buildings and their occupants.
- ZZ. Understand services provided to students with handicapping conditions and the impact on district finances.

EDA 890 Issues in Site Management for School Business Administrators

- A. Evaluate the system of a school district and apply techniques to enhance leadership effectiveness in that organization:
 - 1. Diagnose the culture of a school district and the relationship of leadership to organizational health.
 - 2. Identify the components of the social system of the school and the role relationships within a district.
- 8. Understand elements inherent in cultural diversity as they relate to leadership in urban, suburban, and rural school cultures.
 - D. Know the functioning of the teaching-learning process:
 - 1. Understand the job duties of teachers.
 - 2. Understand the job duties of principals.
 - 3. Understand the teaching-learning process and the elements of good teaching.
 - 4. Evaluate the district's strategic plan and its impact on district finances.
 - 5. Know student safety procedures as per the New York State required training on child abuse and SAVE legislation.

EDA 891 Facilities Planning and Management

- A. Plan a capital project.
- B. Receive state and local approval of the project.
- C. Execute the capital project.
- D. Complete all required paperwork for the project, including state aid forms.
- E. Supervise the operation and maintenance function.

- F. Know post 9/11 insurance and safety regulations affecting construction and operation of school buildings.
- G. Ensure the health and safety of the district's buildings, their environment, and their occupants.

EDA 893 School Finance and Revenue Management

- A. Understand the social and economic benefits of education.
- B. Understand and explain economic, social, and political factors affecting the financing of education.
- C. Analyze the various sources of revenue and current proposals to support the educational effort.
- D. Understand the role of federal, state, and local governments and communities in the support of public education.
- E. Know the various statutes pertaining to state aid for education in New York State.
- F. Understand the role of the government in education and be acquainted with current programs of federal aid.
- G. Forecast revenues and engage in long-term financial planning.
- I. Accurately project cash flows.
- K. Understand the responsibilities of public schools to provide financial support to non-public schools.

EDA 894 Public School Accounting

- C. Produce appropriate financial statements for all funds that monitor and manage the financial resources of the district.
- D. Interpret financial statements to the board of education, the public, and other school district stakeholders to assist them in implementing, monitoring, and evaluating the financial implications of the district strategic plan and instructional goals.

EDA 897 Practicum in School Business Administration

- C. Course work:
 - 2. Develop a systems perspective of school business administration through the study of the environment of the business office.
 - 15. Plan elections and referenda.
 - 16. Include building principals in the planning of elections and referenda.
 - 17. Execute all legally required procedures and documents prior to elections and referenda.
 - 18. Practice positive community relationships during elections and referenda.
 - 19. Execute all legally required procedures and documents after elections and referenda.

EDA 897 Practicum and EDA 898 Internship Field Experiences

- B-1. Calculate the percent of total and the change over last year's budgeted amounts for the general fund budget total and each of the following category totals: general support, instruction, transportation, community service, employee benefits, debt service, and interfund transfers.
- B-2. Calculate estimated end-of-year projected annual expenditures and fund balance for each line item in the general fund appropriations budget (must be done any time from November – February).

- B-3. Calculate estimated end-of-year projected actual revenues and fund balance for each line item in the general fund revenue budget (must be done any time from November – February).
- B-4. Calculate the total estimated year-end fund balance for the general fund (must be done any time from November – February).
- B-5. Investigate the use of reserve funds for managing fund balance.
- H-1. Act as a resource person and facilitator to the cafeteria manager in one food service task area (e.g., develop menus to meet state and federal requirements and to maximize donated commodities and current inventories; develop new techniques to promote sales and to market the school lunch and/or breakfast program; undertake the CRE or the SMI review; undertake the official school district review of free and reduce price meal applications; update current food inventories and order additional purchased and donated food items; develop bid specifications and participate in the selection of good and services; implement a school breakfast program).
- J-1. Complete a project in one regular school curriculum and instruction task area (e.g., participate actively on an instructionally-related group such as the PTA or a curriculum committee; participate in a teacher staff development program designed to improve instructional strategies; contribute to a K-12 curriculum guide; shadow a building principal for a day).
- J-2. Complete a project in one special education curriculum and instruction task area (e.g., attend a CSE or CPSE meeting; attend a special education impartial hearing; complete STAC forms).
- J-3. Write a report summarizing key points of the district’s strategic plan and analyze its impact on district finances.
- J-4. Spend a day shadowing a principal in each of two different settings that are culturally different from the student’s own (urban, rural, suburban) (cannot be used for J-1).
- L-1. Act as a resource person and facilitator to the director of building and grounds in one operations and maintenance task area (e.g., develop a comprehensive maintenance plan; develop bids for electricity or natural gas; develop staffing plans; determine energy budgets; develop a recycling program; develop a preventative maintenance program; secure energy grants).
- Q-1. Complete a project in two different supply and fixed asset management task areas (e.g., approve at least ten requisitions; write bid specifications and legal notices; select the lowest responsible bidder among submitted bids; plan and implement a program for the maintenance and repair of equipment; evaluate and dispose of surplus property via trash, bid, auction, etc.; update inventories; update the general fixed assets account group).
- R-1. Act as a resource person and facilitator to the director of transportation in at least one transportation task area (e.g., develop bus routes and schedules; develop a plan for fleet management and maintenance; plan and implement staff training programs; write legal documents and bid specifications for bus purchases; write bid specifications for contracted bus services; investigate the installation of video cameras).

(g) Effectively present financial data in multiple formats; direct a management information system; and implement effective mass and interactive communication strategies and techniques;

- T. Develop proposals and counter-proposals that achieve desired goals.
- U. Formulate compensation plans for personnel.

EDA 691 Principles and Practices of Budgeting

- C. Read and understand a school district budget based on the New York State Uniform System of Accounts.
- D. Build an expenditure plan that enables all students to meet State learning standards and that meets district needs.
- E. Build a revenue budget that maximizes revenues and supports the expenditures needed to fulfill the instructional mission of the district.
- F. Manage the revenue and the expenditure budgets to meet legal limitations.
- H. Prepare all legally required documents for a budget referendum, including a contingent budget.

EDA 692 Design and Use of Microcomputers Systems for School Administrators

- A. Understand basic technical concepts related to computing, including vocabulary and file structures.
- B. Use the Microsoft Office suite of programs for performing business office functions.
- Q. Efficiently and effectively manipulate and present financial data in multiple formats using Excel.
- D. Use technology to facilitate communication.
- E. Use PowerPoint to enhance formal presentations to the public.
- F. Supervise educational technology, including planning and financing computer systems.
- G. Know and use Internet sites relevant to school business administration to stay current on hot topics, new legal requirements, and innovative practices.

EDA 890 Site Management for School Business Administrators

- C. Use appropriate managerial skills:
 - 1. Communicate effectively both orally and in writing.
 - 2. Listen intently and respond intelligently to the presentations of others.

EDA 893 School Finance and Revenue Management

- E. Know the various statutes pertaining to state aid for education in New York State.
- G. Forecast revenues and engage in long-term financial planning.
- H. Apply taxation concepts and practices, including the calculation of tax rates for towns in a school district.
- I. Accurately project cash flows.

EDA 894 Public School Accounting

- D. Interpret financial statements to the board of education, the public, and other school district stakeholders to assist them in implementing, monitoring, and evaluating the financial implications of the district's strategic plan and instructional goals.

- K. Know various computer programs for school district accounting and be familiar with various formats for presenting financial data.

EDA 897 Practicum and EDA 898 Internship Field Experiences

- G-1. Produce a PowerPoint presentation.
- M-1. Write at least one substantive memo to a group of staff members from self or on behalf of others.
- P-4. Make a formal oral presentation to the board of education (preferred) or a community group.
- P-5. Write a substantive memo to the board of education from self or on behalf of others.

NOTE: TWO CATEGORIES (Cultural Diversity and Human Relations Skills) HAVE BEEN ADDED TO THE CATEGORIES ORIGINALLY REQUESTED BY THE CONTENT REQUIREMENTS IN 52.21. THOSE TWO CATEGORIES ARE (h) and (i) below.

(h) Respect cultural differences among school districts and understand their impact on the teaching-learning process and the logistical operations of a school district;

SDBL students learn about school district cultures other than their own to enable them to support all students in meeting State learning standards.

EDA 656 Personnel Administration

- I. Select candidates regardless of race, creed, national background, sex, age, or physical handicap.

EDA 691 Principles and Practices of Budgeting

- L. Understand the budget process in a fiscally dependent district (Big Five City Districts).

EDA 693 Administration of Support Services

- F. Understand services provided to students with handicapping conditions and the impact on district finances.
- G. Know the grant-writing process to help maximize district revenues.

EDA 890 Issues in Site Management for School Business Administrators

- A. Evaluate the system of a school district and apply techniques to enhance leadership effectiveness in that organization:
 - 8. Understand elements inherent in cultural diversity as they relate to leadership in urban, suburban, and rural school cultures.

EDA 893 School Finance and Revenue Management

- K. Understand the responsibilities of public schools to provide financial support to non-public schools.

J-4. Spend a day shadowing a principal in each of two different settings that are culturally different from the student's own (urban, rural, suburban) (cannot be used for J-1).

P-3. Attend a regular meeting of the board of education in each of two different school districts that are culturally different from the student's own (urban, rural, suburban).

(i) Possess not only good financial skills but also good people skills

To be successful leaders of business operations and to effectively assist the district's instructional administrators, SDBLs need outstanding human relation skills to deal with a variety of district stakeholders.

EDA 656 Personnel Administration

S. Accept the process of negotiations as a way of achieving mutual agreement.

EDA 691 Principles and Practices of Budgeting

J. Secure local support of the budget by educating the public using legal procedures.

EDA 692 Design and Use of Microcomputers Systems for School Business Administrators

C. Use technology to facilitate communication.

EDA 890 Issues in Site Management for School Business Administrators

A. Evaluate the system of a school district and apply techniques to enhance leadership effectiveness in that organization:

1. Diagnose the culture of a school district and the relationship of leadership to organizational health.
2. Identify the components of the social system of the school and the role relationships within a district.
3. Articulate a team leadership approach to management.
4. Compare and contrast organizational and personal goals and conflicts arising from the differences.
5. Use fundamental conflict resolution strategies.
6. Compare alternative ways of assessing organizational effectiveness.
7. Explain trends in changing role relationships in relation to site autonomy, empowerment, and professionalism.

B. Apply effective elements of human relations and principles of leadership and group dynamics to team-building strategies:

1. Identify leadership styles and their implications for specific contexts.
2. Function as a supportive member of a group.
3. Apply consensus building strategies and tactics to a specific problem.
4. Apply techniques of conflict resolution.

C. Use appropriate managerial skills:

1. Communicate effectively both orally and in writing.
2. Listen intently and respond intelligently to the presentations of others.
3. Develop a system for decision-making that assures maximum input and consideration of all viable options.
4. Synthesize leadership training skills and knowledge of organizational dynamics in planning for change.

EDA 892 Legal Issues for School Business Administrators

- C. Perform all duties in a lawful and ethical manner.

EDA 894 Public School Accounting

- D. Interpret financial statements to the board of education, the public, and other school district stakeholders to assist them in implementing, monitoring, and evaluating the financial implications of the district's strategic plan and instructional goals.

EDA 897 Practicum in School Business Administration

- C. Course work:
 2. Develop a systems perspective of school business administration through the study of the environment of the business office.
 3. Maintain a good and supportive relationship with the superintendent of schools.
 4. Maintain a good and supportive relationship with the board of education.
 18. Practice positive community relationships during elections and referenda.

EDA 897 Practicum and EDA 898 Internship Field Experiences

- M-4. Establish and maintain a positive and constructive relationship with the chief school officer.
- M-5. Treat confidential information in an appropriate manner.
- M-6. Establish and maintain a positive and constructive relationship with administrators, teachers, support staff, and community members.
- M-7. Encourage positive morale among the business office staff.

XI. PROGRAM OF STUDY

The program of study meeting the requirements for School District Business Leader certification is a 42 credit hour, post master's program. Students who matriculate into the program meet with the Program Coordinator to complete a program of study that becomes a contract for the completion of the program. (See Appendix C for a copy of the program of study.)

The SDBL courses are (see Appendix D for course descriptions):

	Credit Hours
EDA 656 Personnel Administration 3	
EDA 691 Principles and Practices of Budgeting	3
EDA 692 Design and Use of Microcomputer Systems for School Business Administrators 3	
EDA 693 Administration of Support Services 3	
EDA 890 Issues in Site Management for School Business Administrators 3	
EDA 891 Facilities Planning and Management 3	
EDA 892 Legal Issues for School Business Administrators 3	
EDA 893 School Finance and Revenue Management 3	
EDA 894 Public School Accounting 6	
EDA 897 Practicum in School Business Administration	6
EDA 898 Internship in School Business Administration	6
TOTAL PROGRAM 42	

EDA 656 Personnel Administration is taught by the following faculty members:

Dr. Sandra Graczyk (Program Coordinator and full-time faculty member)

Mr. Carl McLaughlin (part-time faculty member)

EDA 691 Principles and Practices of Budgeting is taught by the following faculty member:

Dr. Sandra Graczyk (Program Coordinator and full-time faculty member)

EDA 692 Design and Use of Microcomputers for School Business Administration is taught by the following faculty member:

Mr. Steven Ayers (part-time faculty member)

EDA 693 Administration of Support Services is taught by the following faculty member:

Dr. Clark Godshall (part-time faculty member)

EDA 890 Issues in Site Management for School Business Administrators is taught by the following faculty member:

Dr. Joseph Hoff (full-time faculty member)

EDA 891 Facilities Planning and Management is taught by the following faculty members:

Ms. Melissa Lawson (part-time faculty member)

Mr. Joseph Meaney (part-time faculty member)

EDA 892 Legal Issues for School Business Administrators is taught by the following faculty members:

Ms. Melissa Lawson (part-time faculty member)

Mr. Joseph Meaney (part-time faculty member)

EDA 893 School Finance and Revenue Management is taught by the following faculty member:

Mr. Steven Ayers (part-time faculty member)

EDA 894 Public School Accounting is taught by the following faculty member:

Dr. Sandra Graczyk (Program Coordinator and full-time faculty member)

EDA 897 Practicum in School Business Administration is taught by the following faculty member:

Dr. Sandra Graczyk (Program Coordinator and full-time faculty member)

EDA 898 Internship in School Business Administration is taught by the following faculty members:

Mr. Donald Covell (full-time faculty member)

Dr. Sandra Graczyk (Program Coordinator and full-time faculty member)

The chart delineating the full-time faculty in the department is included in Appendix E.

The chart delineating the part-time faculty in the department is included in Appendix F.

XII. PROGRAM COMPLETION

Indicate whether courses will be offered with sufficient frequency so that the full program may be completed in one academic year (includes summer). If not, please indicate how many semesters will be required for program completion. If this is a doctoral program, indicate whether courses will be offered with sufficient frequency so that the full program may be completed in three academic years.

The CAS Program in School Business Administration may not be completed in one academic year. Students take 6 credits each fall and each spring plus a 3 credit hour course each of two summers, enabling them to complete the entire program in three years. If a student should miss a semester or not take 6 credits per semester, their program completion time is extended.

Students in these cycle groups generally remain together throughout the entire cycle. Cycles always start with EDA 691 Principles and Practices of Budgeting and EDA 893 School Finance and Revenue Management to give students a good foundation in basic school business practices early on in the program. Also, EDA 897 Practicum in School Business Administration is offered within the first half of the program. There are two main reasons for this: (1) to help solidify students career plans and (2) to enhance future course work by integrating learned practices with classroom theory. A typical cycle would follow this format:

Semester #1: Fall	Credit hours
EDA 691 Principles and Practices of Budgeting	3
EDA 893 School Finance and Revenue Management	
3	
 <i>Semester #2 : Spring</i>	
EDA 897 Practicum in School Business Administration	6
 <i>Semester #3: Summer</i>	
EDA 692 Design and Use of Microcomputer Systems for School Business Administrators	
3	
 <i>Semester #4: Fall</i>	
EDA 890 Issues in Site Management for School Business Administrators	
3	
EDA 892 Legal Issues for School Business Administrators	
3	
 <i>Semester # 5: Spring</i>	
EDA 693 Administration of Support Services	
3	
EDA 891 Facilities Planning and Management	
3	
 <i>Semester #6: Summer</i>	
EDA 656 Personnel Administration	
3	
 <i>Semester # 7: Fall</i>	
EDA 894 Public School Accounting	
6	
 <i>Semester #8: Spring</i>	
EDA 898 Internship in School Business Administration	6

XIII. PROGRAM RESOURCES

- A full time faculty member has just been added to the staff
- A budget of \$14,400 (presently meets the Department needs)
- A library allocation of \$ 3,500 (presently meets Department needs)
- A Web site – www.brockport.edu/edadmin
- A listserve
- A large graduate population who provides substantial word-of-mouth recommendations
- Administrators in the field who provide substantial word-of-mouth recommendation

XIV. LEADERSHIP EXPERIENCES

(a) Programs shall require candidates to successfully complete leadership experiences that shall:

- (1) include leadership experiences in districts serving students at different developmental levels and with a variety of characteristics and socioeconomic backgrounds;*
- (2) be carefully selected and planned by program faculty in collaboration with school district leaders, with learning outcomes specified that are connected to program competencies and with the achievement of those competencies regularly evaluated by program faculty; and*
- (3) be supervised by certified school district leaders and by program faculty who have preparation and expertise in supervision related to school district business leadership.*

(b) The leadership experiences specified in clause (a) of this subparagraph shall occur throughout the program of study. In addition, they shall culminate in a full-time experience of at least 15 weeks that is structured to provide leadership responsibilities of increasing breadth and depth.

(c) Alternatively, the leadership experience specified in clause (a) of this subparagraph may occur in a competency-based format different from that prescribed in clause (b) of this paragraph provided that the program demonstrates that such format is substantially equivalent to the format prescribed in clause (b) of this subparagraph.

Leadership experiences (see Appendix G -- Rating Sheet: Mastery of School Business Administration Competencies) are undertaken throughout the entire program. They are typically approved during the Practicum (EDA 897) and the Internship (EDA 898); however, students can request that the Program Coordinator review and approve field work at any time during the program. The SDBL Program is competency-based in which applying theory to practice occurs in every course based on assignments that mirror tasks that practicing school business administrators are required to perform as part of their duties. Competencies defined in the Rating Sheet may be completed in three ways:

1. On-the-job or volunteer experience, such as calculating the school district tax spread;
2. Class assignments, such as investigating the use of reserve funds for managing fund balance (in EDA 894 Public School Accounting);
3. Tasks completed during the Practicum and the Internship.

For the Practicum and the Internship, students are required to develop contracts (see Appendices H and I for examples) delineating the leadership activities they will undertake during each field experience. The contract must be approved by the field supervisor and the college professor prior to the start of the course.

The Practicum is a six credit hour course which contains a required field experience (15 hours per week for 15 weeks) for students, as well as five Saturdays (9:00 am – 4:30 pm) of course instruction dealing with such topics as the duties of the district clerk, writing board minutes, developing and implementing board policies and administrative regulations, and legal responsibilities regarding elections and referenda. In addition, each student also meets for at least one hour individually with the college professor for review and approval of completed competencies. A minimum number of competencies must be completed to successfully pass the Practicum.

The Internship is a six credit hour course during which time the candidate must spend at least 20 hours per week for 15 weeks in a single setting under the direction of a qualified mentor. (Equivalent variations in this time frame are available.) All competencies in the Rating Sheet must be completed in order to pass the Internship.

Field supervisors for the Practicum and the Internship must have been superintendents of schools or certificated school business administrators working in a public school district or BOCES for at least three years and must submit a letter indicating their agreement to work with the candidate in a professional manner.

XV. PROGRAM REQUIREMENTS FOR GRADUATION

(a) Candidates shall have successfully met all program requirements established by the institution of higher education and required for program registration;

(b) Candidates who have not earned a master's degree prior to admission shall qualify for a master's degree upon program completion, and shall have successfully completed 60 semester hours of graduate study that may include graduate study completed prior to admission and the graduate study required to develop knowledge and skills for school district business leadership, as specified in the program's content requirements.

A master's degree is required for admission into the SDBL Program. Upon successful completion of the 42 required credit hours of SDBL course work, students earn in excess of 60 semester hours of graduate study. To graduate and earn the SUNY Brockport degree of Certificate of Advanced Studies in School Business Administration, students must complete all of their SDBL course work, have a GPA of 3.0 or better, and have successfully completed all competencies listed in the Rating Sheet. Through the process of institutional endorsement, they are then eligible to be recommended to NYSED for SDBL certification.

All performance competencies listed in the Rating Sheet must have been rated by both a field supervisor and a college supervisor. In addition, the field supervisor completes a final review of the candidate's performance and so verifies with a signature.

This documentation is reviewed by the department and a final recommendation is made. Checkpoints throughout the program of study include permission to register for the Practicum (EDA 897) as well as the Internship (EDA 898). These checkpoints include a review of completed courses with a grade of B or better and an approved field site placement.

XVI. INSTITUTIONAL ACCOUNTABILITY

(i) Institutions shall be accountable for the quality of their programs leading to certification of education leaders and the candidates who complete such programs, and shall demonstrate that their programs are evaluated regularly and that such evaluations are considered for making program improvements.

Institutional accountability of the program started with a required review and site visit for its initial approval (approved in September 1990). The site visit took place on April 27, 1989 and was very complementary to the program (see Appendix J). There has not been need to change the program's courses, structure, or format since its inception.

In May 1992, the SDBL Program was required to undergo external review as part of an institutional review process for all campus departments. Again, the review was highly favorable (see Appendix K).

As part of a College-wide review of its academic offerings in 1995, 1998, and 2000, the program was scrutinized by College administration. Each time, the program was awarded the highest rating (see Appendix L).

In addition, the institution requires each department to submit an annual report. (See Appendix M for the two most recent department annual reports.)

All faculty (full-time and part-time) are required to administer student Instructional Assessment System (IAS) forms at the last class session in each of their courses every semester. Copies of the three different forms the department uses are included in Appendix N. These evaluations are completed anonymously by all students in the course, with one student serving as the administrator of the evaluation. The evaluations are then collected by that student, placed in a postage-paid envelope, and returned to the Department office. The Program Coordinator reviews computer analyses of these evaluations each semester. Full-time and part-time faculty whose scores are low are not asked to teach again in the program.

At the end of each internship course, students are asked to complete a short survey to assess program quality. The questions and the mean results are below, with a scale of 0 = Excellent and 4 = Very Poor:

		May 01 Aug.96	Dec 97	May 97
1.	The program as a whole was: 0.11		0.13	0.18
				0.43
2.	The content of the program was: 0.57			0.20
			0.20	0.18
3.	The contribution of the Program Coordinator to my personal growth was: 0.30			
		0.13	0.18	0.29
4.	The effectiveness of program instructors was: 0.18			
		0.13	0.27	0.57

XVII. ACCREDITATION

The entire Department of Educational Administration was recently accredited by NCATE. Documents from the SDBL Program were submitted by the Department as part of the review process. However, the SDBL Program itself could not be individually accredited, because there is no existing constituent council containing program guidelines for school business administration programs.

March 5, 2004

TO: Faculty Senate

FR: Christine E. Murray, Dean
School of Professions

RE: Education Administration Program Re-registration

I am in support of the proposed changes needed for the CAS in Educational Administration leading to the new School District Leader Certification. These changes are required as a result of the new State Education Department regulations for educational leadership certifications.

The programs leading to the new certificate titles, School Building Leader and School District Business Leader, do not require any revisions. Even though the School Building Leader and School District Business Leader remain unchanged, the State Education Department is requiring re-registration of all three programs, hence your receipt of all three notebooks.

Thank you for your prompt attention to this program revision proposal.

slm