

<p style="text-align: center;"><b>George Fox University</b> <b>Department of Educational Foundations and Leadership</b></p>
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EDFL 650 (3-semester hours)

*Managing Organizational Resources*

Spring 2007: 1/22 to 4/27

On-line format with face-to-face

Seminar 2/10/07, 9am – 5pm, Salem Center

ON-LINE LOGIN: <http://foxtale.georgefox.edu>

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## Course Syllabus

### **Managing Organizational Resources**

Educational leaders must balance the allocation of scarce resources among competing interests while managing the organizational structure and empowering those who support the organizational mission. This course prepares educators to address the value tensions inherent in the allocation of resources and the educational consequences linked to those fiscal decisions. Issues of efficiency, equity, adequacy, and control in educational finance will be specifically addressed from historical, economic, moral, legal, and political perspectives. The course also provides a critical analysis of organizations, how they function, why people in organizations behave as they do, and examines the formal and informal decision-making structures that affect educational organizations from within and without the organization. It also will explore some future trends and innovations in school resource management.

#### **Objectives:**

As a result of this course student will:

1. Critically evaluate the tensions between leading constituents and managing organizational resources.
2. Diagnose the overall strengths and weaknesses of an organization as it attempts to reach its goals through the allocation and use of resources.
3. Demonstrate an understanding of the links between resources, student performance, and accountability issues.
4. Analyze how organizations move from one level of performance to a higher level of performance.
5. Use the research literature to recommend solutions to organizational problems.
6. Understand that budgeting is a discipline to decide which organizational arenas should be fully funded and which should not be funded at all.

#### **Course Structure:**

Our inquiry will take the form of weekly colloquium discussions and reflective writing in the online format. You and your prior knowledge are an important part of our learning experience together. Thus, your active participation in this class is necessary. The Odden & Archibald text offers challenging perspectives for this area along with some uncommon strategies for organizational efficiency. The Friedman work, while not

directly related to education, will invite creative speculation about future strategies for more efficient schools. Other readings will provide some balancing perspectives and give a context for the financial management of organizational resources. To prepare you for the online class sessions, our virtual classroom, you will need to do these readings and participate thoughtfully in the class discussions.

You will show evidence of your knowledge gained in the class by completing the following:

1. consistent meaningful participation in weekly class discussion;
2. researching and presenting a fiscal issue relating to educational organizations;
3. three reflective writing assignments incorporating ideas from our class discussions and the readings;
4. choosing one of the final project options that require you to analyze an organizational problem related to resources, research information related to the problem, and develop a paper which provides clear thinking and solutions for your problem; and
5. present your problem and its analysis to the class in a virtual Educational Resource Conference. For the final project you will analyze your organizational problem from a research perspective and present it in a modified case study form (described below). For the written project, you will be expected to use APA style when citing your sources. This final project is intended to demonstrate a synthesis of the course content.

### Required Readings:

Odden, Allan & Archibald, Sarah, (2001). *Reallocating resources: How to boost student achievement without asking for more*. Thousand Oaks, CA: Corwin Press. [ISBN: 0-7619-7653-1 paperback; 0-7619-7652-3 hardcover]

Friedman, Thomas L. (2005). *The world is flat: a brief history of the twenty-first century*. New York: Farrar, Straus and Giroux. [ISBN: 978-0-374-29288-1 paperback; 0-374-29288-4 hardcover]

Additional readings will be assigned in selected units and will be available electronically.

### Alignment with State & National Standards and the GFU Conceptual Framework

Objective	Oregon TSPC Standards & National Standards*	Conceptual Framework	Assessment
1. Critically evaluate the tensions between leading constituents and managing organizational resources.	1a, b, c, d, e 3c 4a, b, c 5a, b, c 6a, b, c	TC TP PJ	Final Synthesis Project Reflection Papers Weekly Reflective Writing Fiscal Issue Project
2. Diagnose the overall strengths and weaknesses of an organization as it attempts to reach its goals through the allocation and use of resources.	3a, b, c	TC	Final Synthesis Project
3. Demonstrate an understanding of the links between resources, student performance, and accountability issues.	2a, b, c, d 3a, b, c 4 c 6a, b, c	TC TP PJ	Final Synthesis Project Reflection Papers Weekly Reflective Writing Fiscal Issue Project

4. Analyze how technology plays a central role as schools seek a higher level of performance.	1a, b, c, d, e 2a, b, c, d 6a, b, c	TP PJ TC	Final Synthesis Project Reflection Papers Weekly Reflective Writing Fiscal Issue Project
5. Use the research literature to recommend solutions to organizational problems.	1a, b 3a, b, c 4b, c 6a	TP PJ TC	Final Synthesis Project Fiscal Issue Project
6. Understand that budgeting is a discipline to decide which organizational arenas should be fully funded and which should not be funded at all.	1a, b 3a, b, c 4a, b, c 5a, b, c 6a, b, c	TP PJ TC	Final Synthesis Project Reflection Papers Weekly Reflective Writing Fiscal Issue Project

### Course Requirements:

- 1. Preparation & Participation** – Students are expected to actively participate in each week’s session. Participation in online discussion requires at least two thoughtful postings per week (as well as other necessary acknowledgements and affirmations. At least one posting should be early enough in the week to allow others to respond to you during the week. (Two postings Sunday night defeats the purpose of discussion!) All discussion should exhibit respect for the thoughts of others. Disagreement is expected and productive but should be done from the perspective of sharing a different perspective. Text readings, supplemental readings, and unit projects are to be completed on their respective due date(s). Late work will earn reduced credit unless a modified due date was agreed upon with the instructor in advance.
- 2. Presentation: Fiscal Management Issues** — Students will be assigned to research one component of fiscal leadership as it relates to managing organizational resources. Students will be required to report their findings to the rest of the class in a PowerPoint presentation. The issues projects should include the following dimensions: 1.) Technical Perspectives (proper allocation, control, distribution, and use of resources), 2.) Organizational Perspectives (the structure, systems, policies, and procedures for managing resources), 3.) Political Perspectives (issues of power and authority in relationships that are involved in fiscal management), or 4.) Ethical Perspectives (fairness, equity, and other related ethical issues that confront leaders who manage resources). Students should do their research using related journals in the social sciences, and educational scholarship. Students will choose from the following list or propose a new topic to me for approval. We will do a “claiming” process online to select topics so that no topics will be repeated.
  - Legal issues related to state funding of public schools.
  - Financing charter, voucher... and other alternative forms of education.
  - Equity issues associated with Title I funding.
  - The effect of collective bargaining on school finance
  - Historical overview of Oregon State budgeting for education.
  - Funding vs. student performance at the local school district level.
  - Resource issues related to private Christian education – primary, secondary, or higher education.
  - Using education funding and budgeting to drive reform
  - Funding technology: An albatross around the neck?
  - Access issues for minority groups as they relate to funding and the budget process.
  - School-based financing strategies for building administrators.
  - Oregon’s Quality Education Model: What does it take to finance?

- Litigation cases and their impact on school finance.
- Strategies for passing bonds in local communities
- ... any other topic that fits with the course's content and is approved by the instructor.

All PowerPoint presentations must include a list of references (in APA format) within the presentation. The presentations will be posted online and the rest of the class will interview the presenter online about the presentation.

***Considerations in Managing Fiscal Resources: Possible Website Resources***

- Oregon Department of Education
  - *School Finance Data and Analysis*, <http://dbi.ode.state.or.us/>
  - *School Finance 101*, <http://dbi.ode.state.or.us/schfinance101.htm>
- Hadderman, M. (2001), *Trends & Issues: School Finance*, [http://eric.uoregon.edu/trends\\_issues/finance/](http://eric.uoregon.edu/trends_issues/finance/)
- Oregon School Board Association, *School Finance Tool Kit*, <http://www.osba.org/hotopics/funding/toolkit/funding.pdf>
- [United States Department of Education], *Public School Finance Programs of the United States and Canada* [http://nces.ed.gov/edfin/state\\_finance/StateFinancing.asp](http://nces.ed.gov/edfin/state_finance/StateFinancing.asp)
- [American Federation of Teachers], *Charter Finance*, <http://www.aft.org/charterfinance/venturesome/>
- [National Parent Information Network], *Trends and Issues: School Finance* <http://npin.org/library/2001/n00504/n00504.html>
- [Northwest Regional Educational Laboratory], *School Finance* <http://www.nwrel.org/cnorse/booklets/educate/7.html>
- [Odden, A. (1995)], *Critical Issues: Redesigning School Finance: Moving the Money to the School* <http://www.ncrel.org/sdrs/areas/issues/envrnmnt/go/go300.htm>
- [Office of Superintendent of Public Instruction] *Budget and School Business Services*, <http://www.k12.wa.us/sf/>
- [AFT Educational Foundation], *The National Charter School Finance Study*, <http://www.aft.org/charterfinance/home.htm>
- [Public Education Network], *School Finance*, <http://www.publiceducation.org/resources/finance.htm>
- [U.S. Census Bureau], *Federal, State, and Local Governments Public Elementary-secondary Education Finance Data*, <http://www.census.gov/govs/www/school.html>

3. **Formal Reflection Papers:** Write three reflective papers on the weekly reading of your texts. The reflections need to address the ideas discussed in the readings (and discussions of those ideas in class), your responses to the ideas in the text, and applications to your sphere of influences. A particular emphasis for each reflection is listed in the syllabus. Papers should be two-to-three pages (500-700 words) in length. All reflection papers must be submitted by email ([scathers@georgefox.edu](mailto:scathers@georgefox.edu)) and should be attached as Word documents.
4. **Final Project: Organizational Problem Case Study** — Students will investigate an organizational problem or challenge and write it up as a case study, applying research findings to the problem. The problem can be a current one that needs solving, a problem faced by an organization in the past, or a problem likely to be faced by the student should he or she enter a new sphere of influence. The final projects will be presented in a 10-12 page (approx. 2500-3000 words) formal paper. Students will be given latitude in their particular area of investigation. Proposals for final projects are to be submitted to the instructor no later than February 26. Papers should be written using APA Manual of Style for citing references. **The final written version is**

**due by April 22 and will be posted for class review and comment.** You will submit an electronic copy posted in our FoxTALE class area (Microsoft Word only).

5. **Final project Defense:** Students will answer questions from the learning community regarding their final projects. Points will be earned for your ability to defend your work and your success in helping the rest of us learn from what you did.

Formal Reflection Paper/Final Project Assessment					
Score	Scale	Organization	Detail	Content	Mechanics
5	Excellent	<ul style="list-style-type: none"> <li>Clearly states ideas.</li> <li>Clear focus in direction.</li> <li>Draws Reader into context.</li> </ul>	<ul style="list-style-type: none"> <li>Specific examples provided.</li> <li>Details are consistent with theme.</li> </ul>	<ul style="list-style-type: none"> <li>Content has a balanced and natural flow of thoughts and ideas.</li> </ul>	<ul style="list-style-type: none"> <li>One or two minor errors.</li> <li>No major errors.</li> <li>Good use of mixed resources.</li> </ul>
4	Good	<ul style="list-style-type: none"> <li>States ideas.</li> <li>Focus is well directed.</li> <li>Reader is not encumbered by context.</li> </ul>	<ul style="list-style-type: none"> <li>Examples are adequate.</li> <li>Details generally align with examples.</li> </ul>	<ul style="list-style-type: none"> <li>Content has balance of one or two consistent thoughts</li> </ul>	<ul style="list-style-type: none"> <li>A few minor errors</li> <li>No more than one major error.</li> <li>Good use of mixed resources.</li> </ul>
3	Fair	<ul style="list-style-type: none"> <li>Main ideas are stated and may not be clear.</li> <li>Focus strays at times.</li> <li>Reader is sometimes encumbered by context.</li> </ul>	<ul style="list-style-type: none"> <li>Few examples given to support text.</li> <li>Details are provided but are unclear</li> </ul>	<ul style="list-style-type: none"> <li>Content is rough but maintains some focus.</li> </ul>	<ul style="list-style-type: none"> <li>Some minor and some major errors</li> <li>Some errors cause reader confusion.</li> <li>Adequate use of mixed resources.</li> </ul>
1 - 2	Poor	<ul style="list-style-type: none"> <li>Main ideas are unclear and vague.</li> <li>Strays often and does not stay focused.</li> <li>Reader is confused by content.</li> </ul>	<ul style="list-style-type: none"> <li>Few if not examples are given.</li> <li>Details are clumsy and hard to understand.</li> </ul>	<ul style="list-style-type: none"> <li>Content lacks focus and points are not fully developed</li> </ul>	<ul style="list-style-type: none"> <li>Many major errors.</li> <li>Errors cause consistent confusion.</li> <li>Poor use of mixed resources.</li> </ul>

### **Final Project (Case Study) Detail: Applying Theory and Knowledge to Solve Organizational Problems**

Your final project will be a case study. The task is to investigate a resources problem in your organization that needs solving. The problem can be related to any aspect of resource management: staffing, technology, finances, information systems, budgeting, building systems, maintenance, issues related to financing, or any other resource challenge. Inform yourself about how others have solved similar problems by researching the literature on the topics that affect your problem. The problem must have sufficient

complexity to warrant research and must create a dilemma that does not have an obvious solution. That is why proposals must be well-thought-out and must be approved.

For example, maybe your organization is having trouble with managing data vital to the success of the organization (i.e., scheduling, student records, financial aid, recruiting students, etc.). As a result of these challenges you want to investigate how other organizations have managed information systems and how they are funded and implemented. Or you have a facilities resource challenge: too many students but not enough buildings. Research the literature to investigate the challenges faced by organizations when attempting to move to larger facilities yet have capital funding issues. Find a problem that is important to you. A good way to frame the problem is to phrase it in the form of a question. That way you can focus on one problem that needs investigating.

Your 10-12-page write-up of your case study and research should include the following:

Case Study Introduction — Your introduction should include four parts. A **road map** that gives direction to the entire paper. The **purpose** section identifies your topic and the research question that leads from your problem. For example, maybe you are having trouble getting constituents to vote for a bond that would be used to build a new middle school in the community. This might lead to the question, "How can I get a reluctant community to fiscally support capital construction? Or here's the same problem only using a real event: How did Newberg School District get voters to support the building of a new elementary school on a night when almost all the other school districts in Oregon had their building bond proposals defeated? The **setting** provides a thorough and complete description of the classroom, school, school district, or organization in which the problem lies. Do capture the setting well, you may have to interview key players in the organization. The **importance** section explains to the reader why this problem is important. Briefly explain the history that led up to the present situation. Describe the circumstances behind your problem and why it needs resolution. If there is statistical data that helps to explain the problem then include the pertinent data.

Literature Review — The purpose of this section is to 1) present an overview of the literature dealing with this subject, 2) review previous research related to your study, and 3) place your problem in proper context. This is a limited review, not an exhaustive presentation. Selectivity is a must. Include only relevant material. Use the social science, management, and organizational research, as appropriate and as related to education, to inform you of possible solutions to your problem.

Leading and Managing Issues — All organizational resources are bounded by some context as you have indicated in the introduction. However, there are also leading and managing issues that affect the problem and must be considered. In this section you should address those issues from a theoretical or research perspective. The leading and managing literature that you have been reading for this class should help to provide perspective. Feel free to use it, as well as any other perspectives on leading and managing. The literature on leading for-profit organizations may be helpful even to those of you who are public school leaders. This is your opportunity to demonstrate an understanding of the complexity of the problem and of the many perspectives from which a school leader must consider problems.

Recommendations — Give the reader 3-5 possible recommendations for solving the problem. Use your research to inform your recommendations. For each recommendation discuss briefly the costs or benefits. You then need to evaluate the benefits in relation to the costs of this option. **Apply this procedure to all the recommendations.** After stating your recommendations conclude by stating the solution you think best fits your situation. Give a rationale for why this one should be followed.

Use APA Style for citing references. Be consistent in the citation method.

**Course Schedule:**

<p><u>Week 1</u> Week of January 22</p>	<p><b><i>Course Introduction</i></b></p> <ul style="list-style-type: none"> <li>• Online: <ul style="list-style-type: none"> <li>• Building a community of learners – post introductions.</li> <li>• Post responses to class members.</li> </ul> </li> <li>• Read Al Ramirez, (2003), “The Shifting Sands of School Finance,” <i>Educational Leadership</i>, 60 (4), 54-58.</li> <li>• Orientation to course requirements.</li> </ul>
<p><u>Week 2</u> Week of January 29</p>	<p><b><i>We operate in a changing world!</i></b></p> <ul style="list-style-type: none"> <li>• Read Friedman p.3-80: chap. 1 and chapter 2 through “Flattener 3”</li> <li>• Participate in class discussion online.</li> </ul>
<p><u>Week 3</u> Week of February 5</p>	<p><b><i>The need for new paradigms</i></b></p> <ul style="list-style-type: none"> <li>• Read Friedman p. 80-172: remainder of chap. 2</li> <li>• Participate in class discussion online.</li> <li>• Select Fiscal Issue to present to class</li> </ul>
<p>Saturday February 10 Executive Seminar</p>	<p><b><i>Executive Weekend</i></b></p> <ul style="list-style-type: none"> <li>• Meet at George Fox University Salem Center 9 a.m. – 5 p.m. (directions posted)</li> <li>• Discussion of Course, Final Project and Fiscal Issue assignments</li> <li>• Shared experiences</li> <li>• Forum discussion</li> <li>• Simulation activities</li> </ul>
<p><u>Week 4</u> Week of February 12</p>	<p><b><i>How does global change relate to education?</i></b></p> <ul style="list-style-type: none"> <li>• Read Friedman p. 173-249: chap. 3-6</li> <li>• Read assigned articles (see discussion)</li> <li>• Participate in class discussion online.</li> <li>• Share your ideas for final projects.</li> </ul>
<p><u>Week 5</u> Week of February 19</p>	<p><b><i>New goals for education</i></b></p> <ul style="list-style-type: none"> <li>• Read Friedman p. 250-338: chap. 7-9</li> <li>• Participate in class discussion online.</li> <li>• Read assigned articles (see discussion)</li> <li>• Due: Reflection paper #1. Needs to be focused on readings and classroom discussions.</li> </ul>
<p><u>Week 6</u> Week of February 26</p>	<p><b><i>How to “win” in the 21<sup>st</sup> century: applications to education</i></b></p> <ul style="list-style-type: none"> <li>• Read Friedman p. 339-470: chap. 10-13</li> <li>• Participate in class discussion online.</li> <li>• Read assigned articles (see discussion)</li> <li>• Submit Final Project proposals to me in the “Project Proposals” assignment location. Proposals should be a clear paragraph describing the problem, how it is a resource problem, and what you hope to find out through the project.</li> </ul>

<p><u>Week 7</u> Week of March 5</p>	<p><b><i>Restructuring models</i></b></p> <ul style="list-style-type: none"> <li>• Read Odden &amp; Archibald p. 1-30: Introduction - chap. 2</li> <li>• Participate in class discussion online.</li> <li>• Read Kathleen F. Grove, (2002), “The Invisible Role of the Central Office,” <i>Educational Leadership</i>, 59, (8), 45-47.</li> </ul>
<p><u>Week 8</u> Week of March 12</p>	<ul style="list-style-type: none"> <li>• Read Odden &amp; Archibald p. 31-58: chap. 3-4</li> <li>• Participate in class discussion online.</li> <li>• Read Nancy Doorey and Bruce Harter, (2003), “From Court Order to Community Commitment,” <i>Educational Leadership</i>, 60 (4), 22-25.</li> <li>• Linda C. Morice and James E. Murray, (2003), “Compensation and Teacher Retention: A Success Story,” <i>Educational Leadership</i>, 60 (8), 40-43.</li> </ul>
<p><u>Week 9</u> Week of March 19</p>	<p><b><i>Fiscal Issues Online Conference</i></b></p> <ul style="list-style-type: none"> <li>• Financial Issue Presentations will be conducted by posting your presentations <u>by 8am Monday morning</u>.</li> <li>• Richard F. Elmore, (2002), “Hard Questions About Practice,” <i>Educational Leadership</i>, 59 (8), 22-25. (Posted in “Readings”)</li> <li>• Review each presentation.</li> <li>• Post at least one probing question for each presentation.</li> </ul>
<p>Week of March 26 (Spring Break)</p>	<p><b><i>Enjoy!</i></b></p>
<p><u>Week 10</u> Week of April 2</p>	<p><b><i>Fiscal Restructuring of Schools</i></b></p> <ul style="list-style-type: none"> <li>• Read Odden &amp; Archibald p. 59-73: chap. 5</li> <li>• Participate in class discussion online.</li> <li>• Due: Reflection paper #2. Needs to be focused on fiscal issues presentations.</li> </ul>
<p><u>Week 11</u> Week of April 9</p>	<p><b><i>Changing the Status Quo</i></b></p> <ul style="list-style-type: none"> <li>• Read Odden &amp; Archibald p. 74-90: chap. 6</li> <li>• Participate in class discussion online.</li> <li>• Read these articles (in “Readings”): <ul style="list-style-type: none"> <li>○ Michael Fullan, “Understanding Change” in <i>Leading in a Culture of Change</i>, San Francisco: Jossey-Bass, 31-49.</li> </ul> </li> <li>• Discuss issues related to changing schools with the class</li> <li>• Share effective strategies for implementing change in schools</li> </ul>
<p><u>Week 12</u> Week of April 16</p>	<p><b><i>Creating Empowered Schools</i></b></p> <ul style="list-style-type: none"> <li>• Read <ul style="list-style-type: none"> <li>○ Roland S. Barth, (2002), “The Culture Builder,” <i>Educational Leadership</i>, 59 (8), 6-11.</li> <li>○ Barbara Kohn, (2002), “Improving Faculty Conversations,” <i>Educational Leadership</i>, 59 (8), 31-33.</li> <li>○ Michael Fullan, (2002), “The Change Leader,” <i>Educational Leadership</i>, 59 (8), 16-20.</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>○ Anthony Bryk &amp; Barbara Schneider, "Trust in Schools: A Core Resource for School Reform," <i>Educational Leadership</i>, 60 (6), 40-55.</li> <li>• Participate in class discussion online.</li> <li>• Post projects by midnight Sunday, April 22</li> </ul>
<p><u>Week 13</u> Week of April 23</p>	<p><b><i>Conclusion to Course: Final Organizational Problem Presentations</i></b></p> <ul style="list-style-type: none"> <li>• Hosted Project Presentations</li> <li>• Due: Reflection paper # 3. Needs to be focused on your overall learning in the course.</li> <li>• Course Evaluation: complete by April 29</li> </ul>

### Grading:

The grading scale will be based on numerical points. Each evaluation will receive a grade in point value. Each of the assignments must be completed and sent to the instructor or posted on, or before, its due date. One grade level will be deducted each class week the assignment is late. No assignment will be accepted after two weeks. Students are expected to prepare for each week and to fully participate in class discussions. The final grade scale will reflect the following percentages:

Assignment	Point Total
Preparation and Participation (2 pts/week)	30
Presentation: Fiscal Management Issue	10
Formal Reflection Papers	15
Organizational Problem: Project Defense	10
Organizational Problem: Final Project	35
<b>TOTAL POINTS</b>	<b>100</b>

Letter Grade	Points
A	100 – 93.5
A-	93.4 – 90
B+	89.9 – 87.5
B	87.4 – 83.5
B-	83.4 – 80
C+	79.9 – 77.5
C	77.4 – 73.5
C-	73.4 – 70
D+	69.9 – 67.5
D	67.4 – 63.5
D-	63.4 – 60
F	59.9 – 0