

# New Course Proposal

Submit completed form electronically

1. **Course prefix and course number:** LEAD 587
2. **Course title:** School Law and Finance
3. **Abbreviated title for class schedule** (30 characters or less): School Law and Finance
4. **Credit hours:** 3  
*(note: if credits are variable, list range of credits (e.g. 1-8 credits))*
5. **Catalog description:** Studies federal, state, and local legal institutions, laws, and finance guidelines that affect schools and district leaders.
6. **Prerequisites** *(to add each additional prerequisite, start a new line):*  
*(See attached Note for samples)*

A. (course prefix, (space) and number)      or      or      or      or

B. (course prefix, (space) and number)      or      or      or      or

C. (course prefix, (space) and number)      or      or      or      or

7. **Co-requisites** *(including labs, if any):*  
A. (course prefix, (space) and number)      or      or      or      or

8. **Major/Class restrictions:** Please indicate any class or major restrictions:

9. **Repeatable:** If course is repeatable list maximum credits:

10. **Labs requirements:** If course includes a lab: # of hours lecture:      ; # of hours lab:

11. **Fees:** List any course fees:

12. **Grade Mode:** Graded only: A-F Pass/No Pass only:      Option:

13. **CIP Code:** Six-digit CIP code (check with your dean):

14. **Special qualifications; Is course proposed for (yes/no):**

A. University Studies?      If yes, list Strand(s)

B. Honors?

C. Community-Based Learning?

15. **Cross-listing:** List any cross-listing:                      and                      and                      and                      and

16. **Strategic justification for proposed course:**

A. **Rationale:** What is the overall strategic rationale for offering this course? The Oregon Teacher Standards and Practices Commission (TSPC) requires educators to complete a law/finance course for administrative licensure.

B. **Alignment:**

1. How does this course align with the unit's mission plan? This course will position SOU to continue to provide administrative licensure programs.

2. How does the course fit into the rest of the unit's curriculum? As all LEAD courses are aligned to TSPC administrative standards, this course aligns with the current curriculum sequence.

C. **Enrollment:** What is the new course's estimated enrollment each time it is offered over a three-year period? Year 1: 20; Year 2: 20; Year 3: 20

D. **Resource evaluation:** What resources – faculty, equipment, lab space, etc. -- will be needed to offer this course and how will those resources be obtained?

1. *Faculty:*

- a. Who will teach the course? Term-by-term instructor or faculty
- b. Evaluate unit's faculty availability and/or needs and the impact on other teaching obligations. This course will replace an open-course numbered elective.
- c. If additional faculty members are needed, how will that need be met? N/A

2. *Facilities:* Cite any additional need for classrooms, equipment or lab space; explain how that need(s) will be met. N/A

3. *Other:*

- a. Are Hannon Library resources sufficient to meet the needs of this course? N/A
- b. Are any other resources needed to support this course? N/A  
If so, please explain how they will be obtained.

E. **External impact:**

1. What is the expected effect of this course on existing programs elsewhere in the university? N/A

**NOTE:** Please document your contact with other departments which may be affected by this new course and the response you received.

2. Will any of your prerequisites affect other departments/programs? N/A

**NOTE:** Please document your contact with other departments/programs which may be affected by this new course and the response you received.

**17. Syllabus (condensed)**

*(Attach an accompanying, condensed syllabus, which should include the following items. Schedules and similar details are **not** required.)*

- A. Course description (same as Catalog description, above)
- B. Learning objectives of the course
- C. Required texts
- D. Course format
- E. Other – any other relevant materials needed to explain the goals and teaching methods of this course.

Approvals:

\_\_\_\_\_  
Signature of chair/director

\_\_\_\_\_  
date

\_\_\_\_\_  
Signature of dean

\_\_\_\_\_  
date

5/13/10

Southern Oregon University/CAL  
LEAD : School Law & Finance  
Instructor: John Higgins  
Email: [jhiggins@sou.edu](mailto:jhiggins@sou.edu)  
Cell: 541-441-2280

587?

**Course Logistics-** This class meets on Friday nights and Saturdays to accommodate full time working professionals. The class meeting times and dates are:

**Friday September 28, 4:30-8:20 PM**

**Saturday September 29, 9:00 AM- 3:20 PM**

**Friday October 26, 4:30-8:20 PM**

**Saturday October 27, 9:00 AM- 3:20 PM**

**Friday November 30, 4:30-8:20 PM**

**Saturday December 1, 9:00 AM- 3:20 PM**

The class will meet in EP in the Education/Psychology Building.

Meals are not provided but are encouraged and consider packing a lunch for your Saturday class sessions. We will take a break so that you can visit a local restaurant if you wish. Friday nights cover the dinner hour (for most of us!) so consider bringing something to share in the form of finger foods. As we all know, if we are tired, hungry and thirsty it will be difficult to enjoy our class interactions! Come prepared to engage (and be engaged) in the course activities.

Given that we will only meet six times, it is critical that you complete the readings and "preparation for class" activities prior to class to get the most out of our time together.

**Course Description:** This course is designed to familiarize students with key school law and finance topics relevant to Oregon school administrators in practice today. The objective is not to have participants become fluent in the underlying legal and financial authorities, but rather become comfortable with the key legal and financial principles when dealing with issues that arise and providing participants with an approach to obtain the guidance they need to make a decision in a given situation, as well as when to seek necessary assistance from District leadership or legal counsel.

An administrator who develops a solid understanding of key school law and finance concepts, as well as an ability to apply these concepts into their professional practice, will be able to address the Oregon Administrative standards as set out in the table below.

Course Objective	Standards Addressed		Demonstration
Develop a solid working knowledge of the key legal and financial concepts critical to effectively manage school/District day-to-day activities, as well as big picture, long term planning needs.	3.1	Manage the	<ul style="list-style-type: none"> <li>Attendance at all class sessions and class session preparation.</li> <li>Relevant and meaningful class participation in the various legal and financial areas covered in the course.</li> <li>Shared interaction with relevant colleagues (including District administration) regarding timely legal/fiscal challenges facing their District.</li> </ul>
	3.2	Organization Manage	
	3.3	Operations Manage	
Develop a thorough understanding of applicable Teacher Standards & Practices Ethical Rules, as well as relevant school board policies, to ensure the administrator and supervised colleagues operate at the highest level of professional conduct.	5.1	Acts with Integrity	<ul style="list-style-type: none"> <li>Active participation during in class case study review &amp; discussions.</li> <li>Preparation and submission of three well thought out and developed legal/financial research papers in accordance with course guidelines.</li> </ul>
	5.2	Acts Fairly	
	5.3	Acts Ethically	
Develop a keen appreciation of how the school legal and financial framework directly and indirectly impacts the larger context of other standard areas of shared vision, school culture and community collaboration.	6.1	Understand larger	Demonstration of larger context appreciation with specific examples during class discussions, case study reviews and legal/financial paper content.
	6.2	Responds to larger context	
	6.3	Influences larger context	

### Course Materials-

- The Law of Students, Schools and Teachers in a Nutshell (6th Edition 2018) ("Nutshell"). The Nutshell course and desk top reference book is available in hardcopy & electronic format through Amazon.
- Oregon Teacher Standards and Practices Ethical Rules.
- Your Online District Policy Manual (see Grants Pass School District example).
- 2018 OSBA/COSA Legislative Report/Hungerford School Law Recent Developments Summary.
- 2018-19 Oregon State School Funding/ADMw Estimates.
- Your District's 2018/19 Budget Message & Document.

**Session Preparation/Participation Requirements-** The course will be taught using the Socratic method using case study group discussion handouts to explore legal and financial challenges facing school administrators.

Students will be expected to review each weekend's reading assignment (as set out below) in advance of the sessions and be prepared to discuss the key legal elements of the session topic, as well as their school district policy that addresses the session topic and refers to a case in the session topic material. Each weekend session will end with a small group case study review and discussion covering the various topics outlined in that weekend's material during which all students will be expected to participate.

The ***School Finance weekend session*** will review the Oregon State School Fund Formula components and how they are reflected in the 2018/19 state school funding and enrollment estimates for participants' school districts. Participants should review and be prepared to discuss the overall state school funding summary and their individual school district funding and weighted average daily membership (ADMw), as set out in the linked material below. Participants should also review their District's 2018/19 Official Budget Message and Budget Document which are usually posted on the district's website or can be obtained through the district's business department.

The following tables set out the weekend session topics, related reading assignments and key issues/questions to be addressed.

<b><u>Weekend Session 1- October</u></b> <b><u>26-27 Teachers &amp; the</u></b>		
<b><u>Topic</u></b>	<b><u>Material to Review</u></b>	<b><u>Key Questions/Issues</u></b>
Introduction/Course Scope/Legal	Syllabus	<ul style="list-style-type: none"> <li>• Introduction</li> <li>• Review of Course content/requirements</li> </ul>
Student Due Process	Nutshell Chapter 3	<ul style="list-style-type: none"> <li>• What are the key constitutional elements &amp; leading authority for each student rights area?</li> <li>• What balancing test have the courts employed in setting student right parameters?</li> <li>• How is federal legal authority reconciled with relevant state law provisions?</li> <li>• How is applicable authority reflected in school board policy and what governs if there is a conflict?</li> <li>• How does special education law impact student rights?</li> <li>• How should an administrator approach a student rights matter?</li> <li>• When should an administrator contact the District Office or legal counsel for support?</li> </ul>
Student Free Speech	Nutshell Chapters 4 & 6	
Search & Seizure	Nutshell Chapter 7	
Student Discipline	Nutshell Chapter 8	

**Weekend Session 2- October 26-27.**  
**2018 Students & the Law**

<b><u>Topic</u></b>	<b><u>Material to Review</u></b>	<b><u>Key Questions/Issues</u></b>
Negligence	Nutshell Chapter 12	<ul style="list-style-type: none"> <li>• What are the key components of negligence in a school setting?</li> <li>• Who can be held to be negligent in a school setting?</li> <li>• What is the school district's liability for negligence?</li> </ul>
Teacher Qualifications & Hiring	Nutshell Chapter 15	<ul style="list-style-type: none"> <li>• What are the legal rights of prospective employees?</li> <li>• What can the District require/control when it comes to hiring?</li> <li>• Does the Board have any flexibility in establishing hiring parameters?</li> <li>• What prior performance considerations can be taken into account?</li> <li>• What prior performance/conduct must be</li> </ul>
Teacher Constitutional Rights	Nutshell Chapter 16	<ul style="list-style-type: none"> <li>• What does "teachers' rights do not end at the school house door" mean?</li> <li>• Is there a balancing test with respect to teacher constitutional rights?</li> <li>• If so, how does it compare/contrast with the student rights balancing test?</li> </ul>
Teacher/Administrator Ethical Rules	<u>TSPC Ethical Standards</u>	<ul style="list-style-type: none"> <li>• What are the types of conduct covered by the TSPC ethical Oregon educator rules?</li> <li>• What's the difference between gross neglect of duty and gross unfitness?</li> <li>• What are the reporting requirements for administrators who become aware of potential unethical behavior by and Oregon educator?</li> <li>• How might a collective bargaining agreement</li> </ul>
Teacher Performance, Discipline & Dismissal	Nutshell Chapter 17	<ul style="list-style-type: none"> <li>• How do you distinguish between teacher performance and teacher misconduct?</li> <li>• What are the due process requirements applicable to teacher investigations?</li> <li>• How does a collective bargaining agreement and Board policy impact a</li> </ul>

**Weekend Session 3- November 30 & December 1, 2018**

**School Finance/Hot Topics**

<b><u>Topic</u></b>	<b><u>Material to Review</u></b>	<b><u>Key Questions/Issues</u></b>
Sources of Oregon School Funding	<ul style="list-style-type: none"><li>• <a href="#"><u>School Funding Estimates</u></a></li><li>• <a href="#"><u>ADMw Estimates</u></a></li></ul>	<ul style="list-style-type: none"><li>• What are the main sources of Oregon school funding?</li><li>• What are the factors that determine a school district's school funding level?</li><li>• What funding factors can a school district impact?</li><li>• What are your school district's school funding trends/challenges?</li></ul>
State School Funding Components		
School District Budget Building	<ul style="list-style-type: none"><li>• <a href="#"><u>How School Budgets are Built</u></a></li><li>• Your District Budget Message</li><li>• Your District Budget Document</li></ul>	<ul style="list-style-type: none"><li>• What does Board policy provide for building a school district budget?</li><li>• What are the main cost components in your school district's budget?</li><li>• What significant <a href="#"><u>cost containment challenges</u></a> face you district?</li><li>• How does collective bargaining impact school district budgeting?</li><li>• What percentage of the school district budget do administrators provide meaningful input?</li><li>• Why is it important for school administrators to have a good understanding of their district's funding, cost drivers and budget trends?</li></ul>
Recent School Law Developments/Hot Topics	<ul style="list-style-type: none"><li>• <a href="#"><u>OSBA/COSA Summary</u></a></li><li>• Hungerford Legal Updates</li></ul>	<ul style="list-style-type: none"><li>• What recent school legal/financial developments are the most impactful for your district?</li><li>• What school law/finance areas are the most urgent in terms of Oregon legislative action?</li></ul>

**Written Assignments-** Students will be required to submit three 3-5 page papers (double spaced) covering a recent school legal/finance issue from each weekend session area.

The *Students & the Law* and *Teachers & the Law* papers should include a summary of the facts, the legal issue involved, the relevant legal/District Policy authority and the conclusion/outcome of the issue.

For the *School Finance* paper, students should review their District's 2018/19 Official Budget message and prepare a summary of the critical current and future fiscal challenges facing their District.

Students can review their selected paper topics/parameters with the instructor. ***All papers will be due on Saturday December 1.***



## **Grading-**

**Session Attendance (15%)**- Students will receive 5% grading credit for attending each weekend session.

**Session Preparation/Participation (45%)**- Students will receive 15% grading credit for each weekend session in which they display a thorough knowledge of the basic session topics and actively engage and participate in class discussions and small group case study review and presentation.

**Written Assignments (30%)**- Students will receive 10% grading credit for each succinctly written assignment paper that clearly sets out the underlying facts, relevant issue(s), applicable authority and a conclusion that applies that authority to the underlying facts. Each paper will be graded based on a 0% to 10% scale based on these criteria.

**Extra Credit (10%)**- Students can receive up to 10% extra credit grading credit by displaying above average preparation/participation during the weekend sessions displaying exemplary analytical/lateral thinking during class discussions including (but not limited to) how session topics interrelate and overlap with cited examples.

### ***Grading Rubric:***

90-100%	A
80-89%	B
70-79%	C
60-69%	D
Less than 60%	No Credit

## **SOU Cares**

SOU has a wide range of resources to help you succeed. Our faculty, staff, and administration are dedicated to providing you with the best possible support. The SOU Cares Report allows us to connect you with staff members who can assist with concerns, including financial, health, mental health, wellbeing, legal concerns, family concerns, harassment, assault, study skills, time management, etc. You are also welcome to use the SOU Cares Report to share concerns about yourself, a friend, or a classmate at <http://www.sou.edu/ssi>. These concerns can include reports related to academic integrity, harassment, bias, or assault. Reports related to sexual misconduct or sexual assault can be made anonymously or confidentially. Student Support and Intervention provides recourse for students through the Student Code of Conduct, Title IX, Affirmative Action, and other applicable policies, regulations, and laws.

## **Academic Honesty Statement and Code of Student Conduct**

Students are expected to maintain academic integrity and honesty in completion of all work for this class. According to SOU's Student Code of Conduct: "Acts of academic misconduct involve the use or attempted use of any method that enables a student to misrepresent the quality or integrity of his or her academic work and are prohibited".

Such acts include, but are not limited to: copying from the work of another, and/or allowing another student to copy from one's own work; unauthorized use of materials during exams; intentional or unintentional failure to acknowledge the ideas or words of another that have been taken from any published or unpublished source; placing one's name on papers, reports, or other documents that are the work of another individual; submission of work resulting from inappropriate collaboration or assistance; submission of the same paper or project for separate courses without prior authorization by faculty members; and/or knowingly aiding in or inciting the academic dishonesty of another.

Any incident of academic dishonesty will be subject to disciplinary action(s) as outlined in SOU's Code of Student Conduct:

[http://arcweb.sos.state.or.us/pages/rules/oars\\_500/oar\\_573/573\\_076.html](http://arcweb.sos.state.or.us/pages/rules/oars_500/oar_573/573_076.html)

In case of loss, theft, destruction or dispute over authorship, always retain a copy of any work you produce and submit for grades. Retain all written work that has been graded and handed back to you.

### **Statement on Title IX and Mandatory Reporting**

Federal law requires that employees of institutions of higher learning (faculty, staff and administrators) report to a Title IX officer any time they become aware that a student is a victim or perpetrator of gender-based bias, sexual harassment, sexual assault, domestic violence, or stalking. Further, Oregon law requires a mandatory report to law enforcement of any physical or emotional abuse of a child or other protected person, including elders and people with disabilities, or when a child or other protected person is perceived to be in danger of physical or emotional abuse. If you are the victim of sexual or physical abuse and wish to make a confidential disclosure please use the confidential advising available at <http://www.sou.edu/ssi/confidential-advisors.html>, or use Southern Oregon University's Anonymous Harassment, Violence, and Interpersonal Misconduct Reporting Form

[https://jfe.qualtrics.com/form/SV\\_7R7CCBciGNL473L](https://jfe.qualtrics.com/form/SV_7R7CCBciGNL473L)

### **SOU Academic Support/Disability Resources:**

To support students with disabilities in acquiring accessible books and materials, and in planning their study and time management strategies, SOU requires all professors to include a statement on Academic Support and Disability Resources on course syllabi. It is the policy of Southern Oregon University that no otherwise qualified person shall, solely by reason of disability, be denied access to, participation in, or benefits of any service, program, or activity operated by the University. Qualified persons shall receive reasonable accommodation/modification needed to ensure equal access to

employment, educational opportunities, programs, and activities in the most appropriate, integrated setting, except when such accommodation creates undue hardship on the part of the provider. These policies are in compliance with Section 504 of the Rehabilitation Act of 1974, the Americans with Disabilities Act of 1990, and other applicable federal and state regulations that prohibit discrimination on the basis of disability.

If you are in need of support because of a documented disability (whether it be learning, mobility, psychiatric, health-related, or sensory) you may be eligible for academic or other accommodations through Disability Resources. Call Academic Support Programs at **(541) 552-6213** to schedule an appointment with Disability Resources. The Academic Support Programs office is located in the Stevenson Union, lower level. See the Disability Resources webpage at [www.sou.edu/dr](http://www.sou.edu/dr) for more information. If you are already working with Disability Resources, make sure to request your accommodations through them for this course as quickly as possible to ensure that you have the best possible access.

# LEAD ~~528~~ 530- Leadership into Practice

1 to 9 credits

Creates conditions for teacher leadership and requires practice in principles supporting individual and collaborative growth and change. Using current understandings of the forces of educational change and the implementation of personal and professional action plans, students in the ~~MEd/CTL~~ Continuing Administrator License (CAL) Program work at their school sites to aid in teaching and learning improvement. Repeatable for a maximum of 20 credits.

*Grade mode designated on a CRN basis each term. Students should consult current term schedule.*