

Educational Leadership Informational Booklet

***FOR THE FIELD
INTERNSHIP EXPERIENCE PROPOSAL***

FOR THE SDBL



Stony Brook University

INTRODUCTION

OVERVIEW OF THE INTERNSHIP PROGRAM

The Educational Leadership Internship is defined as the process and product that result from the application in a workplace environment of the strategic, instructional, organizational and contextual leadership program standards. It is strategically designed to immerse candidates in educational experiences that support and rely upon the information and skills attained from courses taken in the program.

The internship includes a variety of substantial concurrent or capstone experiences in diverse settings planned and guided cooperatively by university and school district personnel and conducted in schools and school districts over an extended period of time. The experiences need to provide interns with substantial responsibilities in fiscal accountability, which involve direct interaction and involvement with staff, parents, community leaders, and social service organizations involved with inter-agency activities affecting schools. Fiscal accountability in a school district is important in that it provides for the efficient use of resources to support the educational program and the preservation of the assets of the school district.

The experiences within the internship should immerse candidates in activities that will prepare them for the roles and responsibilities of a **School District Business Leader (SDBL)**. The overall goal of the internship will be to structure these field experiences so candidates gain proficiency in the six ISLLC leadership standards and four New York State business leader competencies found on p. 4.

As your SDL and SBL counterparts are learning to become effective instructional leaders, your internship will develop your capabilities to:

1. Create the proper financial and operational conditions through strategic planning that will enable teachers to teach and students to learn by enhancing district and school capacity.
2. Work with district leaders, building leaders, the board of education, and other key educational stakeholders to identify and allocate resources to help build a school system and district wide educational program that will endure and be successful.
3. Manage financial and material resources carefully and ethically, in order to support the development and implementation of the educational vision.
4. Gather and analyze financial and other pertinent data to identify problems, propose solutions, and verify accomplishments.
5. Communicate clearly and effectively to a variety of audiences, using appropriate tools and formats, to achieve clarity and address questions.

The purpose of the Internship Seminar is to facilitate the blending of practical field experiences with academic learning “*in a forum for sharing insights, understanding and developing problem solving and decision making skills, and practicing collaborative problem solving among the interns*” (Veir, 1990).

THE PERSONAL PROFILE

An effective internship must recognize the uniqueness of each intern. The selection and development of comprehensive activities must address individual needs, strengths, areas of weakness, past experiences, and academic preparation. Designing an appropriate individualized internship will, therefore, maximize personal and professional growth and development.

As a result of taking coursework in the Educational Leadership Program you should have increased your proficiency in the professional knowledge, skills and dispositions reflected in the ISLLC leadership standards and New York State business leader competencies. To aid in the design of your internship, answer each question below as they relate to whom you are as an educational business leader. Keep the answers to these questions firmly in mind as you work with administrators within the responsibilities, tasks and projects that will become your complete internship experience.

A finished copy of your Personal Profile must be submitted with your Internship proposal. (Make your Personal Profile 5 separate sections.)

1. Reflect on your present level of proficiency in each of the six ISLLC leadership standards (found on page 4). Arrange them in rank order from the one you have become the most proficient in (#1), to the standard you have mastered the least (#6). Do the same for the four New York State business leader competencies also found on page 4.
2. Discuss the importance of moral and ethical behavior in educational leadership.
3. How have past experiences influenced your values and ideas about leadership?
4. How have the strong and weak points of your academic preparation through Stony Brook influenced your present level of proficiency in the six ISLLC leadership standards and four New York State business leader competencies?
5. What specific needs or goals do you have for doing this internship experience?

STRUCTURE OF THE INTERNSHIP

The internship consists of a minimum of **460 logged hours** of building and district level business administration/supervisory experiences. This is to be accomplished in two semesters. The student has the choice of doing the internship during a summer/fall or spring/summer set of semesters.

The six ISLLC leadership standards and four New York State business leader competencies listed on page 4 will guide and support your internship experience toward the SDBL certification. While you have explored these concepts and their application within your coursework, it is time to manifest them through authentic work in one or more school districts.

ISLLC LEADERSHIP STANDARDS

Standard 1.0: An education leader promotes the success of every student by facilitating the development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by all stakeholders.

Standard 2.0: An education leader promotes the success of every student by advocating, nurturing, and sustaining a school culture and instructional program conducive to student learning and staff professional growth.

Standard 3.0: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by ensuring management of the organization, operation, and resources for a safe, efficient, and effective learning environment.

Standard 4.0: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by collaborating with faculty and community members, responding to diverse community interests and needs, and mobilizing community resources.

Standard 5.0: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by acting with integrity, fairly, and in an ethical manner.

Standard 6.0: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by understanding, responding to, and influencing the larger political, social, economic, legal, and cultural context.

NEW YORK STATE BUSINESS LEADER COMPETENCIES

1. Supporting the district educational vision.
2. Supporting change and sustainability in the district.
3. Overseeing district financial and physical resources.
4. Administering human and support resources to support learning goals.

SDBL INTERNSHIP IN OPERATION

There is agreement that preparation programs must move beyond the case studies and simulations employed solely in the past and generate a problem-based approach that would use real data and focus on developing competency in the real-life knowledge and skills needed for effective school leadership (New York State Board of Regents, 2003; Browne-Ferrigno & Muth, 2001; Capasso & Daresh, 2001; Morgan, Hertzog & Gibbs, 2002; Bottoms & O'Neill, 2001; Kraus, 1996; Bartell, 1994; Hoachlander, Alt & Beltranena, 2001; Perreault & Lunenburg, 2002). More importantly, if these authentic experiences are constructed properly, not only will the intern benefit greatly from the experience, but the sponsoring school district will ultimately be able to deliver better services to its students (Capasso & Daresh, 2001), creating a win-win situation where mutual benefit exists (Covey, 1990).

GENERAL GUIDELINES FOR THE SDBL INTERNSHIP

1. The underlying goal of the SDBL internship is to help you become proficient in the six ISLLC leadership standards and four New York State business leader competencies found on page 4.
2. This is not an academic exercise. Your work in the internship must involve authentic situations.
3. Detailed reports must be submitted at the end of the internship. This will be explained at the first seminar.
4. All work generated within your internship should demonstrate your knowledge of, and proficiency in computer technology and associated applications (i.e.: PowerPoint, spread sheets, etc.)

The work of school district business leaders is comprehensive and encompasses all aspects of the educational system. School district business leaders find themselves at the pivotal position of supporting, or spearheading efforts to sustain or improve educational programs, district and school capacity, problem solving, all facets of change, physical resources, support services, personnel management, etc.

No one, two, or three projects could ever hope to be the vehicle for training candidates in all these areas. The specific roles and responsibilities of the SDBL are so detailed that immersed work is required to properly and effectively prepare potential candidates. The New York State Education Department has identified seventy-five (75) performance standards that emanate out of the four business leader competencies listed on page 4. They represent the actual roles and responsibilities pursuant to being an effective SDBL.

It naturally follows that an appropriate SDBL internship should be one that ensures that candidates become proficient in all 75 performance standards. Therefore, it is the responsibility of the intern to work with both building and district level administrators with the goal of becoming proficient in these 75 standards.

We anticipate that as interns work with many administrators, actual projects and tasks will be assigned which will enable the intern to work on, and become proficient in a number of performance standards at the same time. In other words, interns will not have to work on 75 separate tasks.

The intern, SBU intern supervisor, and cooperating administrator will all oversee this endeavor; however, it will be the responsibility of the cooperating administrator to sign-off on each performance standard when the intern has proven proficiency. This can simply take the form of an ongoing “check-off sheet” (which begins on page 9).

Below are the specific sub-elements found within the 6 ISLLC leadership standards that are pertinent to the work of a SDBL. These can also be used to clarify for interns those areas requiring attention throughout the internship.

Standard 1.0: An education leader promotes the success of every student by facilitating the development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by all stakeholders.	
<i>ISLLC SUB-ELEMENT</i>	<i>ELCC SUB-ELEMENT</i>
1A. Collaboratively <u>develop</u> and <u>implement</u> a shared vision and mission.	Candidate can demonstrate the skills needed to work collaboratively with stakeholders to facilitate the development of a vision of learning for a school district that promotes the success of all students. Candidate can demonstrate the ability to formulate initiatives to motivate staff, students, and families to achieve a school district’s vision. Candidate can demonstrate the ability to bring together and communicate effectively with stakeholders within the district and the larger community concerning implementation and realization of the vision.
1B. Collect and use data to identify goals, assess organizational effectiveness, and promote organizational learning.	Candidate can demonstrate the ability to use data-based research strategies and strategic planning processes that focus on student learning to develop a vision, drawing on relevant information sources such as student assessment results, student and family demographic data, and an analysis of community needs. Candidate can understand the theory and research related to organizational and educational leadership.
1C. Create and implement plans to achieve goals.	Candidate can design research-based processes to effectively implement a district vision throughout an entire school district and community.
1D. Promote continuous and sustainable improvement.	Candidate can demonstrate the ability to articulate the components of this vision for a district and the leadership processes necessary to implement and support the vision.
1E. Monitor and evaluate progress and revise plans.	Candidate can engage in the collection, organization, and analysis of a variety of information, including student performance data, required to assess progress toward a district’s vision, mission, and goals.
Standard 2.0: An education leader promotes the success of every student by advocating, nurturing, and sustaining a school culture and instructional program conducive to student learning and staff professional growth.	
<i>ISLLC SUB-ELEMENT</i>	<i>ELCC SUB-ELEMENT</i>
2A. Nurture and sustain a culture of collaboration, trust, learning, and high expectations.	Candidate can develop a sustained approach to improve and maintain a positive district culture for learning that capitalizes on multiple aspects of diversity to meet the learning needs of all students.
2B. Create a comprehensive, rigorous, and coherent curricular program.	Candidate can demonstrate an understanding of a variety of instructional research methodologies and can analyze the comparable strengths and weaknesses of each method. Candidate can demonstrate the ability to use and promote technology and information systems to enrich district curriculum and instruction, monitor instructional practices, and provide assistance to administrators who have needs for improvement.
2C. Create a personalized and motivating learning environment for students.	Candidate can understand and can apply human development theory, proven learning, and motivational theories, and concern for diversity to the learning process. Candidate can understand how to use appropriate research strategies to profile student performance in a district and analyze differences among subgroups.
2D. Supervise instruction.	Candidate can demonstrate the ability to use strategies such as observations and collaborative reflection to help form comprehensive professional growth plans with district and school personnel.
2E. Develop assessment and accountability systems to monitor student progress	Candidate is able to use qualitative and quantitative data, appropriate research methods, technology, and information systems to develop a long-range plan for a district that assesses the district’s improvement and accountability systems.

2F. Develop the instructional and leadership capacity of staff.	Candidate can develop personal professional growth plans that reflect commitment to life-long learning and best practices.
2G. Maximize time spent on quality instruction.	Candidate can ascertain the relationship between time management and quality instruction.
2H. Promote the use of the most effective and appropriate technologies to support teaching and learning.	Candidates can demonstrate knowledge of adult learning strategies and the ability to apply technology and research to professional development design focusing on authentic problems and tasks, mentoring, coaching, conferencing, and other techniques that promote new knowledge and skills in the workplace.
2I. Monitor and evaluate the impact of the instructional program.	Candidate can demonstrate the ability to facilitate and engage in activities that use best practices and sound educational research to improve instructional programs. Candidate can demonstrate the ability to allocate and justify resources to sustain the instructional program.
Standard 3.0: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by ensuring management of the organization, operation, and resources for a safe, efficient, and effective learning environment.	
<i>ISLLC SUB-ELEMENT</i>	<i>ELCC SUB-ELEMENT</i>
3A. Monitor and evaluate the management and operational systems.	Candidate can demonstrate the ability to use research-based knowledge of learning, teaching, student development, organizational development, and data management to optimize learning for all students.
3B. Obtain, allocate, align, and efficiently utilize human, fiscal, and technological resources.	Candidate can use problem-solving skills and knowledge of strategic, long-range, and operational planning (including applications of technology) in the effective, legal, and equitable use of fiscal, human, and material resource allocation that focuses on teaching and learning. Candidate can creatively seek new resources to facilitate learning. Candidate can apply an understanding of school district finance structures and models to ensure that adequate financial resources are allocated equitably for the district. Candidate can apply and assess current technologies for management, business procedures, and scheduling.
3C. Promote and protect the welfare and safety of students and staff.	Candidate can demonstrate effective organization of fiscal, human, and material resources, giving priority to student learning and safety. Candidate can demonstrate an understanding of how to apply legal principles to promote educational equity and provide a safe, effective, and efficient facilities.
3D. Develop the capacity for distributed leadership.	Candidate does understand the dynamics of distributed leadership and can implement its components among staff members.
3E. Ensure teacher and organizational time is focused to support quality instruction and student learning.	Candidate can demonstrate an ability to manage time effectively and to deploy financial and human resources in a way that promotes student achievement.
Standard 4.0: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by collaborating with faculty and community members, responding to diverse community interests and needs, and mobilizing community resources.	
<i>ISLLC SUB-ELEMENT</i>	<i>ELCC SUB-ELEMENT</i>
4A. Collect and analyze data and information pertinent to the educational environment.	Candidate can engage in the collection, organization, and analysis of a variety of information, including student performance data, required to assess progress toward a district's vision, mission, and goals.
4B. Promote understanding, appreciation, and use of the community's diverse cultural, social, and intellectual resources.	Candidate can demonstrate the ability to facilitate the planning and implementation of programs and services that bring together the resources of families and the community to positively affect student learning.
4C. Build and sustain positive relationships with families and caregivers.	Candidate can develop and implement strategies that support the involvement of families in the education of their children that reinforces for district staff a belief that families have the best interests of their children in mind.
4D. Build and sustain productive relationships with community partners.	Candidate can apply an understanding of community relations models, marketing strategies and processes, data driven decision-making, and communication theory to craft frameworks for school, business, community, government, and higher education partnerships. Candidate can demonstrate an ability to develop and implement a plan for nurturing relationships with community leaders and reaching out to different business, religious, political, and service organizations to strengthen programs and support district goals. Candidate can demonstrate the ability to involve community members, groups, and other stakeholders in district decision-making, reflecting an understanding of strategies to capitalize on the district's integral role in the larger community. Candidate can demonstrate the ability to collaborate with community agencies to integrate health, social, and other services in the schools to address student and family conditions that affect learning.
Standard 5.0: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by acting with integrity, fairly, and in an ethical manner.	
<i>ISLLC SUB-ELEMENT</i>	<i>ELCC SUB-ELEMENT</i>
5A. Ensure a system of accountability for every student's academic and social success.	Candidate is able to use qualitative and quantitative data, appropriate research methods, technology, and information systems to develop a long-range plan for a district that assesses the district's improvement and accountability systems.
5B. Model principles of self-awareness, reflective practice, transparency, and	Candidates can demonstrate knowledge of adult learning strategies and the ability to apply technology and research to professional development design focusing on authentic problems and tasks, mentoring,

ethical behavior.	coaching, conferencing, and other techniques that promote new knowledge and skills in the workplace. Candidate can demonstrate the ability to use strategies such as observations and collaborative reflection to help form comprehensive professional growth plans with district and school personnel. Candidate can develop personal professional growth plans that reflect commitment to life-long learning and best practices.
5C. Safeguard the values of democracy, equity, and diversity.	Candidate can demonstrate the ability to combine impartiality, sensitivity to student diversity, and ethical considerations in their interactions with others. Candidate can understand and can apply human development theory, proven learning, and motivational theories, and concern for diversity to the learning process. Candidate can understand how to use appropriate research strategies to profile student performance in a district and analyze differences among subgroups. Candidate can demonstrate the ability to effectively and appropriately assess, research, and plan for diverse district and community conditions and dynamics and capitalize on the diversity of the community to improve district performance and student achievement.
5D. Consider and evaluate the potential moral and legal consequences of decision-making.	Candidate can make and explain decisions based upon ethical and legal principles.
5E. Promote social justice and ensure that individual student needs inform all aspects of schooling.	Candidate can demonstrate a respect for the rights of others with regard to confidentiality and dignity and engage in honest interactions. Candidate can demonstrate the ability to organize a district based on indicators of equity, effectiveness, and efficiency and can apply legal principles that promote educational equity.
Standard 6.0: Candidates who complete the program are educational leaders who have the knowledge and ability to promote the success of all students by understanding, responding to, and influencing the larger political, social, economic, legal, and cultural context.	
<i>ISLLC SUB-ELEMENT</i>	<i>ELCC SUB-ELEMENT</i>
6A. Advocate for children, families, and caregivers.	Candidate can demonstrate the ability to advocate for policies and programs that promote equitable learning opportunities and success for all students, regardless of socioeconomic background, ethnicity, gender, disability, or other individual characteristics.
6B. Act to influence local, district, state, and national decisions affecting student learning.	Candidate can demonstrate an understanding of the policies, laws, and regulations enacted by local, state, and federal authorities affecting a specific district. Candidate can demonstrate an understanding of how to develop lines of communication with local, state, and federal authorities and actively advocate for improved policies, laws, and regulations affecting a specific district, both directly and through organizations representing schools, educators, or others with similar interests.
6C. Assess, analyze, and anticipate emerging trends and initiatives in order to adapt leadership strategies.	Candidate can demonstrate the ability to communicate regularly with all segments of the district community concerning trends, issues, and policies affecting the district. Candidate can demonstrate an ability to use public information and research-based knowledge of issues and trends to collaborate with community members and community organizations to have a positive affect on student learning.

NYS BUSINESS LEADER COMPETENCIES CHECK-OFF SHEET

AREA I—SUPPORTING THE DISTRICT EDUCATIONAL VISION

1. Understand leadership concepts and their application to the role of the district business leader.

Performance Standards:

- ___ Recognizing key theories of leadership, the research that supports them, and their implications for identifying and using financial and other resources to support the district's educational vision.
- ___ Understanding the role of interpersonal skills, team building, and communication skills in successful school district business leadership.
- ___ Understanding the role of the business leader in enabling students to learn, teachers to teach, and schools to fulfill their purposes.
- ___ Demonstrating knowledge of the systemic nature of school districts by identifying, developing, and implementing organizational and administrative policies and procedures.
- ___ Relating district financial policies to the broader context of schooling (e.g., elements of the political, economic, social, and cultural systems of the community, the state, and the nation).
- ___ Demonstrating an understanding of processes for engaging in and supporting districtwide succession planning, including recruiting, retraining, identifying, and coaching potential leaders.
- ___ Demonstrating an understanding of the use of district resources to support relationships with organizations outside of the school system (e.g., social service agencies, health providers, mental health professionals, the Board of Cooperative Educational Services [BOCES], institutions of higher education [IHEs]).
- ___ Demonstrating an understanding of resources available for professional growth, and maintaining a plan for self-improvement (e.g., continuous learning, reflection, stress and time management, professional networking, active involvement in professional associations).

2. Understand processes used by the district business leader to support and sustain the district educational vision.

Performance Standards:

- ___ Understanding the role of fiscally sound policies and practices in supporting and sustaining the district's educational vision.
- ___ Demonstrating knowledge of how to align school and district financial policies and practices with the district's educational vision.
- ___ Demonstrating knowledge of methods for creating and sustaining financial and operational conditions within the district that enable all students to meet state learning standards and all staff to serve effectively in achieving that objective.
- ___ Demonstrating an understanding of methods for providing accurate financial information to support the educational vision.
- ___ Identifying strategies for continually evaluating district and school financial policies, practices, and outcomes in terms of the district educational vision and the policies and goals of the board of education or other governing entity.

3. Understand principles and practices of clear and effective communication.

Performance Standards:

- ___ Demonstrating knowledge of processes for effectively presenting financial and other pertinent information in multiple formats to varied audiences (e.g., using technology).

- ___ Analyzing methods for supporting the district's educational vision through financial reports, analyses, and presentations.
- ___ Demonstrating knowledge of procedures for directing the development, implementation, and maintenance of a districtwide information management system.
- ___ Demonstrating knowledge of procedures for implementing effective mass and interactive communication strategies and techniques.
- ___ Demonstrating an understanding of community and public relations in presenting and discussing financial and other pertinent information.
- ___ Demonstrating knowledge of how to use effective speaking and listening skills in varied contexts (e.g., communicating with individuals, small groups, large groups).
- ___ Demonstrating knowledge of effective techniques of communicating in writing for varied purposes and audiences (e.g., to inform stakeholders, to prepare grant applications).

4. Understand processes of collaboration and cooperation.

Performance Standards:

- ___ Demonstrating an understanding of strategies for working effectively with the district leader, building leaders, the board of education or other governing entity, staff, parents/guardians, and community members to identify and allocate resources for supporting the educational vision.
- ___ Demonstrating an understanding of strategies for building and maintaining ongoing partnerships with district staff and other stakeholders at both the local and state level.
- ___ Demonstrating an understanding of how to work effectively with diverse groups in the district and community and create an atmosphere that encourages respect and appreciation for all people.
- ___ Identifying procedures for developing consensus and for promoting effective, collaborative problem solving and data-driven decision making regarding district and school financial issues.
- ___ Demonstrating an understanding of how to apply effective conflict-resolution techniques in contexts relevant to the role of the district business leader.
- ___ Demonstrating an understanding of how to identify and share data from a variety of sources to promote collaboration and effective decision making among stakeholders.
- ___ Demonstrating an understanding of behaviors that affirm the importance of integrity and ethics in all interpersonal contact.

AREA II—SUPPORTING CHANGE AND SUSTAINABILITY IN THE DISTRICT

5. Understand the process of change and its relationship to district financial management.

Performance Standards:

- ___ Identifying key concepts and principles of the change process and their relationship to resource issues (e.g., the role of effective and efficient resource allocation, methods for building support for change).
- ___ Demonstrating an understanding of methods for supporting the change initiatives of the district and its schools (e.g., through communication with stakeholders, financial analysis, data gathering, contingency financial planning).
- ___ Identifying and analyzing strategies for financing change in the short and long term while sustaining the district's educational vision.
- ___ Analyzing how change affects finances within the school district in both the short and long term.

6. Understand comprehensive, multiyear, and strategic planning.

Performance Standards:

- ___ Demonstrating knowledge of principles and practices of comprehensive, data-driven, multiyear planning, including the importance of involving all key stakeholders.
- ___ Demonstrating knowledge of procedures for developing, implementing, monitoring, evaluating, and updating the district strategic plan.

___ Demonstrating an understanding of procedures for planning and implementing district instructional programs.

AREA III—OVERSEEING DISTRICT FINANCIAL AND PHYSICAL RESOURCES

7. Understand principles of district financial management.

Performance Standards:

___ Demonstrating knowledge of the school district budget process, including planning, developing, monitoring, and administering, as well as contingent budget restrictions.

___ Demonstrating knowledge of legal and ethical guidelines for managing district resources and ensuring financial stability.

___ Analyzing the implications of economic, demographic, and political trends at the federal, state, and local levels for district finances.

___ Demonstrating knowledge of techniques for accurately forecasting district revenues and expenditures.

___ Demonstrating an understanding of how to assess the district's current financial health and monitor the status of district finances on an ongoing basis.

___ Demonstrating knowledge of sources and mechanisms of public school funding at the local, state, and federal levels and their effects on fiscal equity and fiscal neutrality.

___ Demonstrating an understanding of the impact of and relationship between the tax levy, assessment practices, and equalization rates.

___ Demonstrating knowledge of techniques for projecting student enrollment and staffing needs, and the impact of collectively negotiated agreements for budgeting purposes.

___ Understanding the professional environment of school district business leadership in New York State (e.g., Board of Cooperative Educational Services [BOCES], institutions of higher education [IHEs], the structure of public schooling and finance, the role of the board of education or other governing entity, state and federal laws, regulations, judicial and commission decisions).

___ Demonstrating knowledge of the New York State Code of Ethics for Educators and the role of values and ethics in school district business leadership.

8. Understand financial management practices for school districts.

Performance Standards:

___ Applying knowledge of site-based budget planning and management in conjunction with financial administration.

___ Applying knowledge of cash management procedures, including internal controls.

___ Applying knowledge of procedures for processing and managing payroll, including legal requirements.

___ Applying knowledge of accepted governmental accounting procedures and practices.

___ Applying knowledge of methods for preparing, analyzing, and ensuring the accuracy of interim, monthly, and annual financial statements.

___ Demonstrating an understanding of the roles, responsibilities, and effective utilization of internal and independent auditors.

___ Demonstrating an understanding of types of investment and borrowing instruments available to school districts, including uses, limitations, benefits, risks, and yields associated with different types of instruments.

___ Demonstrating knowledge of fund balance and reserve administration.

9. Understand district business practices.

Performance Standards:

___ Applying knowledge of procedures for managing and tracking inventories, equipment, and capital assets, including amortization techniques and disposal of surplus property.

___ Demonstrating knowledge of how to develop and implement a district risk-management program, including insurance protection, preventive measures, claim administration, and student/employee awareness.

___ Identifying strategies and techniques for establishing and utilizing a positive school district–community communications program appropriate to varying audiences and purposes.

___ Demonstrating an understanding of legal requirements and procedures associated with procurement, bidding, and vendor relationships and the use of requisitions, purchase orders, and invoices.

10. Understand physical plant and facilities management.

Performance Standards:

___ Demonstrating an understanding of how to work with other district staff to develop data-driven, multiyear facilities plans based on enrollment projections, programmatic needs, period of probable usefulness, and the condition of district physical plants.

___ Demonstrating knowledge of how to help plan and implement a preventive maintenance program for district equipment and building operational systems.

___ Demonstrating an understanding of procedures and practices for maintaining a clean, safe learning environment (e.g., custodial and maintenance services, the Occupational Safety and Health Administration [OSHA], federal and state regulations).

___ Identifying energy conservation measures to ensure acceptable levels of energy consumption and cost-effectiveness.

___ Demonstrating knowledge of procedures and legal requirements related to school construction and/or reconstruction (e.g., bidding, bonding, construction contract management, final approval process).

___ Demonstrating knowledge of steps in school construction from planning to completion (e.g., establishing need, selecting construction professionals, developing construction specifications, interacting with government agencies).

___ Demonstrating an understanding of legal requirements related to the acquisition, use, and disposal of real estate and the roles and responsibilities of officials and government agencies in real estate matters.

AREA IV—ADMINISTERING HUMAN AND SUPPORT RESOURCES TO SUPPORT LEARNING GOALS

11. Understand district personnel and human resource administration.

Performance Standards:

___ Demonstrating knowledge of procedures for maintaining accurate employee records.

___ Demonstrating knowledge of issues and procedures in administering employee benefits programs (e.g., retirement systems, worker's compensation, health insurance).

___ Applying knowledge of procedures for recruiting, screening, hiring, assigning, retaining, evaluating, disciplining, and terminating personnel, including the requirements of school board policy and state and federal law.

___ Demonstrating an understanding of how to design and implement staff development and training programs conducive to growth and skill enhancement, including mandated training (e.g., right-to-know, blood-borne pathogens, Automated External Defibrillator [AED]).

___ Demonstrating knowledge of legal requirements associated with human resource administration (e.g., Family and Medical Leave Act [FMLA], Americans with Disabilities Act [ADA], Federal Insurance Contributions Act [FICA], COBRA, Equal Employment Opportunity Commission [EEOC]).

___ Applying knowledge of legal requirements associated with the collective bargaining process when administering negotiated agreements.

___ Recognizing key theories of employee motivation, the research that supports them, and their implication for identifying and using human resources.

12. Understand the administration of support services.

Performance Standards:

- ___ Demonstrating knowledge of safe and efficient student transportation, including statutory and regulatory requirements, efficient routing, schedule development, training, and oversight practices.
- ___ Demonstrating knowledge of district school lunch programs, including local, state, and federal requirements and business management practices for operating an efficient, high-quality program.
- ___ Demonstrating an understanding of issues and procedures related to the provision of health services to students, including legal and regulatory requirements.
- ___ Identifying procedures for ensuring safe and protected school environments in relation to environmental, safety, and security issues, including emergency plans, disaster preparedness, recovery plans, and staff training.
- ___ Demonstrating knowledge of skills and criteria for evaluating, selecting, and implementing districtwide data management technology and systems.

NASBO GATES

NASBO believes that all business interns should be competent in specific tasks or “gates”. As the SDBL intern meets with business officials within the school district, it would be wise to ensure that the following tasks are built into the overall SDBL internship. These tasks will obviously align with specific NY State Business Leader Competencies listed above. The intern supervisor should oversee that this is accomplished.

- Gate #1: The intern must utilize the OGS web site navigating state contracts for procurement.
- Gate #2: The intern must prepare a Statement of Cash Flows.
- Gate #3: The intern must participate in the budgeting process from start to finish as the intern supervisor deems appropriate.
- Gate #4: The intern must prepare supporting documents for STAC forms and prepare reconciliations of receivables of State Aid for students with special needs.
- Gate #5: The intern must become familiar with accounting software. At a minimum the intern should have “read-only” access to navigate the software.
- Gate#6: The intern must research alternate health insurance plans and develop strategies for negotiations.
- Gate #7: The intern must project salaries and benefits for a period of at least three years and present a paper depicting the impact of the projections on future budgets.
- Gate #8: The intern must review auditor reports and become familiar with preparation of financial statements and year end accounting.
- Gate #9: The intern must analyze and evaluate the school lunch program.
- Gate #10: The intern must analyze and evaluate the transportation program.

APPLYING FOR THE INTERNSHIP

STEP 1: INTERNSHIP ELIGIBILITY

The student must submit a copy of his/her unofficial transcript from the SolarSystem to verify eligibility. (27 credits must be completed before the internship begins) This must be accompanied with the **Internship Application** found on page 16. This form will verify the endorsement of the district superintendent and the cooperating administrator. The superintendent's signature verifies that he/she is allowing you to see, hear and be part of confidential information normally not reserved for teachers or members of the greater community. Both items must be promptly submitted to the USB Coordinator of Internships.

STEP 2: SELECTING A COOPERATING ADMINISTRATOR

After the candidate selects a school district for the proposed internship experience a cooperating administrator must be chosen. Although the intern will be working with many administrators, only one cooperating administrator can be selected to oversee the entire internship experience. This should be an administrator that the candidate feels comfortable with, can confide in, and feels confident that this person can provide the adequate mentoring required over time.

The role of cooperating administrators as the critical guide throughout the experiential learning process has been the focus of numerous studies (Daresh, 1995, 1997, Huling-Austin, 1992, Playko, 1991, Crocker & Harris, 2002, Malone, 2001). The research has shown that there is a direct relationship between a successful internship and an effective mentor. Choosing the right administrator to serve as your mentor is a critical and important step in designing your internship and will certainly improve the probability of having a quality experience.

First, here are a few quotes regarding the mentoring process that will help guide your thinking as you choose an effective mentor.

Mentoring is a "comprehensive effort directed toward helping a mentee develop the attitudes and behaviors of self-reliance and accountability within a defined environment" (Kay, 1992).

The work of a mentor should be grounded in a learner-centered approach. "One of the principal reasons that mentoring relationships fail is that the learning process is not tended to and the focus on learning goals is not maintained" (Zachary, 2000).

STEP 3: THE INTERNSHIP PROPOSAL

The items found in the chart on the next page must be submitted to the USB Coordinator of Internships by the date announced at the orientation meeting. Use this chart as a check for yourself that the items are submitted properly. ***No hours can be logged until all items have been submitted and approved by the USB Coordinator of Internships. You will receive official notification by e-mail when you may begin logging hours.*** Once the USB Coordinator of Internships has verified eligibility, the intern may begin working in the field to become proficient in the 75 performance standards previously listed in this document.

ITEMS FOR SUBMISSION

ITEM	HOW TO SUBMIT	IMPORTANCE	CONTAINS	(√)
Internship Application	Mailed	Verifies that the district will allow and support the internship as proposed.	Superintendent and cooperating administrator's signatures.	
Transcript	Mailed	Verifies eligibility	Required courses completed (27 credits for SDL & 21 credits for SBL)	
Personal Profile	<i>E-mailed only (in Microsoft Word)</i>	Enables you to individualize your internship.	Shows perceived leadership strengths/weakness, personal needs or goals, past experiences, and academic preparation that will influence the individual design of the internship. (Submit in five separate sections.)	

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SDBL INTERNSHIP APPLICATION

Applicant: _____
(name) (home phone #)

(address)

(e-mail address) (Stony Brook ID #)
_____ Summer/Fall Semester 20____
_____ Spring/Summer Semester 20____

Employer: _____
(Name of Organization) (Your Position)

(Address) (Business Phone #)

Place of Internship: _____
(District) (School)

(School Location) (School Phone #)

Name of Cooperating Administrator: _____
Title: _____ **Phone:** _____
e-mail address: _____ **Address:** _____

Statement of Commitment:

Intern: I will abide by the internship rules set by the University and the school district. I will complete all requirements for the internship, which have been agreed to with both my cooperating administrator and USB faculty supervisor.

Signature of Intern Date

Supervising Administrators: We agree to provide the experiences, which have been identified in the Internship Proposal, and to provide technical administrative guidance as required. We will evaluate the performance of the intern upon completion of the internship.

Signature of Cooperating Administrator Date

Signature of Superintendent Date

IMPLEMENTING THE INTERNSHIP

Once the Internship Proposal has been approved the intern can begin to engage in the planned educational experiences using the *official start date*. The intern, the USB intern supervisor assigned to the intern, and the district cooperating administrator work together as a team to ensure the effective implementation of the SDBL internship. If problems do arise during the internship, the intern can call upon the USB intern supervisor and/or the Coordinator of Internships as advocates.

THE INTERNSHIP LOG

During the internship the intern is expected to maintain a ***BiWeekly Log*** (found on the next page). After the intern and cooperating administrator sign-off on the accuracy of the entries, the log is submitted to the USB intern supervisor at the biweekly internship seminar.

THE REFLECTIVE JOURNAL

The purpose of the ***Reflective Journal*** is to take time to step back and analyze decisions, actions and thoughts related to your work as an administrator. To improve performance, self-assessment needs to become an integral part of the routine. The intern must make weekly entries into this journal for the purpose of self-evaluation. The cooperating administrator and the USB intern supervisor may ask to review events found in the journal. Journal entries will be required to be posted in the on-line portfolio.

In writing a journal entry, describe a situation through the, who, what, when, where model. Analyze why the situation occurred or why those involved made the decisions they did. Discuss the relationships affected by the situation or decision and appraise the impact of the situation or decision on the school environment. Address the effectiveness of the decision and how operations or management will be improved.

OTHER INTERNSHIP REQUIREMENTS

Specific assignments for each item below will be distributed at the first seminar class.

1. Each intern will be **formally observed** once by the USB intern supervisor.
2. Each intern will attend **2 School Board meetings** and write a 2-3 page critique on each meeting.
3. Each intern will complete **2 clinical observations** with appropriate write-ups.
4. Each intern is encouraged to attend a minimum of **2 ASBO luncheons**.
5. Each intern is encouraged to attend the **spring ASBO conference**.
6. Each intern will maintain an **electronic portfolio**. This comprehensive document will highlight the detailed experiences accomplished within the internship. It will represent a complete portrait of the intern's understanding of the conceptual aspects of leadership within the ISLLC standards.

ASSESSING THE INTERNSHIP EXPERIENCE

A number of assessment tools will be employed at the end of the internship to determine the level of proficiency attained in each of the ISLLC leadership standards and NYS business leader competencies. These assessments will relate to the above internship requirements and determine if the intern has learned the knowledge, skills, and dispositions necessary in becoming an effective school district business leader.

Specific details regarding student evaluation/grading, and the assessment tools that will be employed, will be explained in detail at the first seminar.

