

Issues of Finance, Funding and the Economics of Schools
3 credits

EDL 843

Course Description

This course is designed to assist students in developing the concept of using resources to realize educational goals in an ethical, practical and efficient manner for a school district, leveraging money and other resources for growth and change. Students will be provided with the background necessary to predict and invest revenue, construct budgets, monitor spending plans, and conduct school levy campaigns. National, state, local, legal and political issues will be discussed. Students will learn the role of the superintendent in managing the financial aspects of the school district in order to achieve a vision of greatness.

Course Structure

This course is designed for delivery through face-to-face meetings enhanced by learning activities/discussions online. Students are expected to prepare for class meetings, take part in class activities, contribute to discussions, and support other class members. In short, the class will function as a learning community in which every member shares responsibility for the learning experience of the group.

Learning Outcomes

- Students will understand concepts such as levies, bond issues, property and other taxes, categorical funding and investments.
- Students will understand the impact of equity in funding practices.
- Students will apply knowledge of legal and political issues pertaining to budgets, appropriations, accounting procedures, audits and hearings.
- Students will understand and apply the state funding formula and budget process.
- Students will develop a fiscal calendar.
- Students will understand the purpose and use of various fund sources, the funding of school and organizational facilities and the purchasing and distribution of resources.
- Students will understand the management of the business office, including the history of tracing cash balances and year end encumbrances.
- Students will gain knowledge of staff compensation and benefits packages.

Required Textbook

Candoli, I.C., Hack, W.G., & Ray, J.R. (2008). *Modern school business administration: A planning approach*. (9th ed.). Boston: Allyn and Bacon.

Course Requirements

1. Participation – 10%

Take part in all class activities. Contribute to discussions and activities, both face-to-face and online, in a way that enhances learning for all class members. You will be required to make postings to our D2L Discussion Board. Postings will focus on assigned readings/readings done on your own and how they relate to your past experiences and future endeavors as a leader. Some discussions will be open to the whole group while others will be structured as small group discussions in order to build smaller learning communities. Discussion topics will be provided with specific posting requirements noted for each discussion topic.

2. Case Study Analysis – 30%

Students will analyze two case studies. For each, provide a detailed description of the case under study, including the challenges the district faces regarding budgetary/financial issues. Provide detailed recommendations on the case, including a timeline under which recommendations will be implemented.

3. Building and Managing a Budget: A Simulation – 30%

Students will complete a simulation designed to set, implement and manage a budget from the district level to the school level.

4. Issues Paper – 30%

Students will complete a 10-12 page paper analyzing a chosen topic. The paper must include a summary of how that issue is budgeted for and managed in your current school district, how success/cost effectiveness is assessed, and a plan for improvement. Topics can be pulled from the list of topics included in this syllabus or one proposed by the student.

General Criteria for Assessment

- 1. Construction of Knowledge:** Students successfully interpret, analyze, evaluate, or synthesize information.
- 2. Depth of Understanding:** Student understanding of course content is relatively complex and deep, and they demonstrate that understanding through elaborated communication.
- 3. Connection to Practice and Policy:** Students successfully connect course content to educational practice and/or policy. They explore implications that create value and significance for knowledge.
- 4. Clarity of Expression:** Students demonstrate quality work through well-organized, grammatically correct, precise and accurate writing. They reflect thoughtfulness in word choice, sentence construction and composition.

Course Grading Scale

Letter Grade	Percentage Points
A	94-100
A-	90-93

B+	87-89
B	84-86
B-	80-83
C+	77-79
C	74-76
F	73 or below

Guidelines for Written Assignments

Advanced graduate academic work requires competence in written communication to express your ideas clearly and accurately. Therefore, it is expected that students will be able to articulate their positions, reasoning, and queries with clarity, accuracy, and precision in grammatical construction and language use. Students must demonstrate critical thinking in all of their written work. Further, it is imperative that doctoral students draw upon the work of other scholars and appropriately give credit to others through in-text citations.

Format Requirements for Papers

- Use APA (most recent edition) to format course papers.
- Use inclusive language (do not use masculine pronouns when referring to men and women).
- All papers should be double-spaced with 1-inch margins. Times New Roman font (12 point) is standard.
- Number the pages.
- Writing should be appropriately referenced, giving credit to others for their work by providing accurate citations.
- Where appropriate and possible, draw connections between course concepts/readings and specific examples/experiences. The capacity to relate theory with practice is an important component of the course.
- Writing must be grammatically correct and without spelling, punctuation, or typographical errors.
- Include a list of references at the end of the paper. This list should include all references cited in the paper, and only those cited in the paper.

Guidelines for Online Discussions

There are three very important rules for using online discussion boards:

1. Remember that the culture of mutual respect that is part of our face-to-face time extends into the virtual classroom environment.
2. Participation is required.
3. Participation alone is not enough. Posts require a thoughtful and meaningful approach. Quality does count. Also important is timing. If you wait until the end of the discussion window time, you are not engaging in the type of discussion required.

See “Guidelines and Rubrics for Online Discussions” (D2L Course Content) for further details.

Guidelines for Communication in a Respectful Learning Environment

- Listen receptively. Seek first to understand, then to be understood.

- Attend to the person who has the floor. No sidebar conversations, gestures, or extraneous activity while another person is talking.
- Communicate honestly. If you have a concern or if you are puzzled – explain how you are feeling and why.
- Disagree thoughtfully. Respectful questioning and disagreement is not wrong. Scholarly discourse involves and encourages exploration of different perspectives.
- Derogatory comments based on race, ethnicity, class, gender, sexual orientation, or nationality are not acceptable.

Academic Integrity

The University of Wisconsin Oshkosh is committed to a standard of academic integrity for all students. The System guidelines state: “Students are responsible for the honest completion and representation of their work, for the appropriate citation of sources, and for respect of others’ academic endeavors.” (UWS 14.01, Wisconsin Administrative Code)

Students are subject to disciplinary action for academic misconduct, which is defined in UWS 14.03, Wisconsin Administrative Code. Students are encouraged to review the procedures related to violations of academic honesty as outlined in Chapter UWS 14, Wisconsin Administrative Code. The System guidelines and local procedures are printed in the University of Wisconsin Oshkosh Student Discipline Code 2007-2008 and can be found on the Dean of Students website at www.uwosh.edu/dean/conduct.htm

Specific questions regarding the provisions of Chapter UWS 14 (and institutional procedures approved to implement Chapter UWS 14) should be directed to the Dean of Students Office.

Accessibility Statement

We would like to fully include persons with disabilities in this course. Please let us know if you need any special accommodations. Information will be kept confidential whenever possible. For questions regarding UW Oshkosh policy and available services for students with disabilities, please contact John Palmer, Coordinator of Services for Students with Disabilities in the Dean of Students Office in Dempsey Hall. palmerj@uwosh.edu or 424-3100.

The Writing Center

All UW Oshkosh students are eligible for one-on-one conferencing at the Writing Center. Their free, confidential tutoring is designed to help writers work through assignments and gain additional writing skills. Trained peer consultants can assist writers at any stage of the composition process, from brainstorming for topics to fine-tuning a final draft. They help writers with issues like grammar and mechanics by helping them identify their own patterns of error and learning how to avoid those errors. Check their website for more information about services. (<http://www.uwosh.edu/wcenter>). The Writing Center is located in Suite 102 of the Student Success Center, across from Reeve and Polk on Elmwood Ave.

Communication

Email. Your UW Oshkosh email account is used by the University and by your instructors to communicate University and course information. Please check your UW Oshkosh email frequently.

Weather Concerns. If you are unable to attend class due to hazardous conditions, please notify me via email prior to the scheduled class meeting. In the event that I cannot meet with the class, or most members of the class cannot attend, we will schedule an alternative discussion/learning activity using D2L. Please check your UW Oshkosh email prior to class if you have any questions about the class meeting. I will send an email notice to you no later than 3:30 p.m. if there is an alternative plan for that evening's session.

UW Oshkosh College of Education and Human Services

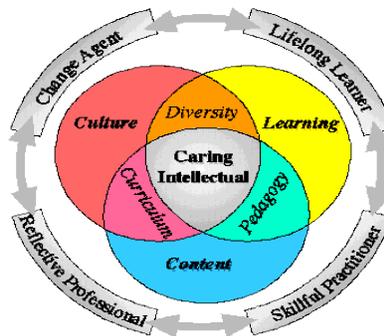
Edd in Superintendency

The **mission** of the EdD in Educational Leadership program leading to licensure as a District Administration is to develop educators to assume formal leadership roles in their organization.

The **goals** of the program are to develop the capacity to:

1. envision and guide organizational change;
2. communicate effectively, engage constituents, develop people and build community;
3. advocate equity for diverse populations, and respect individuals;
4. integrate theory, data, research and ethical standards into the context of one's practice through continuous learning.

The Educator as a Caring Intellectual



Program Dispositions

Throughout this program students will be expected to demonstrate the following dispositions:

- Value change as the source of the opportunity for improvement
- Display the ability to understand people and relationships and be receptive to the ideas of others
- Show a willingness to implement non-discriminatory access, accommodations and assessments.
- Demonstrate empathic understanding of diversity in all domains.

- Reflect regularly upon the philosophical assumptions, ethical principles and rationales that guide one's practice
- Understand oneself as a learner and value learning as a core capacity.

Wisconsin Administrator Standards for Superintendent (03) Licensure

Teacher Standards, Vision, Instructional Program, Management, Family/Community Relations, Ethics, and Context Affecting Schools

(Full documentation available at: <http://tepd.dpi.wi.gov/epp/licensure-program-guidelines>)

Tentative Schedule of Topics

Topics	Activities and Assignments
The budget process Personnel Site based budgeting	
School funding and organizational facilities School referendum and construction	
Legal and Political issues	
State funding Capital reserves	
Budget simulation	
Federal governance & educational finance	
Managing the business office	
Purchasing and resource distribution Student transportation	
Challenges of finance and budgeting: alternative schools, retirement funds, special program budgeting	