Campus Finance and Budgeting
EDAD 5374
Course Syllabus

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OFFICE HOURS:  Monday  1:30 – 4:00
                  Tuesday  1:30 – 4:00
                  Thursday 1:30 – 4:00

CLASS: Monday 7:00 – 9:30 pm
Room: Bay Hall 127

I.  Course Description: This course is a study of the financial operations of public school campuses of Texas. The principal is held accountable for the management of a significant amount of resources provided by the public. This course seeks to prepare the principal with the knowledge and skills necessary to understand and apply the budgeting, accounting, planning, purchasing and auditing functions of a campus.

II. Rationale: This course is designed to prepare a successful school principal to provide leadership and management for the fiscal issues of today’s modern educational organization. Theories, principles, and practice will be presented, particularly as they relate to the business administration functions of a modern school campus.

III. State Adopted Proficiency Domains:
- School Community Leadership
- Instructional Leadership
- Administrative Leadership

IV. TExES Competencies covered in this course:

   Competency 003 Ethics – The principal knows how to act with integrity, fairness, and in an ethical and legal manner.
   1. Model and promote the highest standard of conduct, ethical principles, and integrity in decision-making, actions and behaviors.
   2. Implement policies and procedures that promote professional educator compliance with The Code of
Ethics and Standard Practices for Texas Educators.

3. Apply knowledge of ethical issues affecting education.
4. Apply laws, policies and procedures in a fair and reasonable manner.

Competency 008 Budgeting – The principal knows how to apply principles of effective leadership and management in relation to campus budgeting, personnel, resource utilization, financial management, and technology use.

1. Apply procedures for effective budget planning and management.
2. Work collaboratively with stakeholders to develop campus budgets.
3. Acquire, allocate and manage human, material and financial resources according to district policies and campus priorities.
4. Apply laws and policies to ensure sound financial management in relation to accounts, bidding, purchasing and grants.
5. Use effective planning, time management, and organization of personnel to maximize attainment of district and campus goals.
6. Develop and implement plans for using technology and information systems to enhance school management.

V. Course Objectives and Outcomes:
This course is designed to enable students to:

1. Understand the history and theory of school finance.
2. Understand the financial duties and responsibilities of a campus principal.
3. Understand the responsibility and the relationship between the campus principal, business manager, and superintendent in finance, budget development and management.
4. Demonstrate a working knowledge of the shared decision making approach to the campus budget development process.
5. Develop a campus budget.
6. Demonstrate a working knowledge of the campus accounting process.
7. Demonstrate a working knowledge of the campus auditing process.
VI. Course Topics:
The major topics to be considered are:
- The Ethics of Financial Management
- Funding Sources
- Property Tax System
- Campus budgeting Utilizing the Planning and Decision Making Process
- Accounting
- Auditing

VII. Instructional Methods and Activities
A. Lecture and Discussion
B. Demonstration
C. Small Group Projects (Doctoral students are expected to lead the small group projects during class)
D. Simulations
VIII. Evaluation and Grade Assignment:

1. **Classroom Worksheets:** Students will complete two worksheet assignments in class to demonstrate their level of understanding and proficiency in campus finance. The grades of the classroom worksheets will be averaged together to establish a grade value.

   **30% of Grade**

2. **Homework Worksheets:** Students will complete two homework worksheet assignments to demonstrate their level of understanding and proficiency in campus finance. The grades of the two homework worksheets will be averaged together to establish a grade value.

   **20% of Grade**

3. **Research Paper:** Each student will prepare a research paper on the topic “Ethics and the School budget.” The student will include the finding of the latest research and writing in the field on the ethical considerations of campus budget development. The paper should be typed and double-spaced. It should follow the bibliography format as required by the professor. A minimum of four works should be cited in the bibliography. Five to eight page double spaced. APA Format.

   **20% of Grade**

4. **Culminating Project:** Each student will complete an analysis of a campus operations budget. The campus budget should be from a particular campus.

   **20% of Grade**

5. **Class Attendance and Participation:** While it is understood that many students have personal and professional responsibilities to fulfill during the term of this class, regular and punctual class attendance is expected. Students are expected to actively participate in class discussion and presentation of research findings.

   **10% of Grade**
IX. Course Schedule and policies:

Meeting I
Review Syllabus
Principals Responsibilities in Campus Budgeting

Meeting 2
Introduction and Overview to School Finance
Ethics of Financial Management

Meeting 3
Classroom Worksheet I
Homework Assignment Discussion

Meeting 4
Library Research Day

Meeting 5
Allocation of Funds
Expenditures by Function

Meeting 6
School Finance Structure/Formulas
Special Needs Issues
Homework Assignment Due

Meeting 7
Administrative Leadership Domain

Meeting 8
Educational Productivity
Linking Spending to Student Outcomes
Using Education Dollars More Wisely

Meeting 9
Budget Development
Expenditures by School and Classroom

Meeting 10
Equity and Adequacy in School Finance
Classroom Worksheet II
Research Paper Draft Due
Homework Assignment II Discussion

Meeting 11
Incentive Program

Meeting 12
School-Based Financing
Planning and Decision Making
Homework Assignment II Due

Meeting 13
Teacher Salary Structures
The Purchasing System
Classroom Worksheet III

Meeting 14
Research Paper Due
Final Model Budget Project Due
Policies:

1. Students are expected to complete all assignment on time.
2. Late work will receive a grade penalty of 5 points per class period.
3. Students are expected to read all assigned textbook chapters prior to class discussion.
4. Attendance and class participation are part of the grade.
5. Grading Scale 90-100/A 80-89/B Less than 79/C
6. Incompletes will not be negotiated at the end of the semester.

XI. Bibliography


Walter, J., Prezas, R., and Moody, M. “Bad times and busted budgets; The buck stops At your desk” Board and Administrator, January 2009, Vol. 22, No. 9 pp 1 and 4


Walter, J., Prezas, R., and Moody, M. “Consider these measures in a financial crises” Board and Administrator, January 2009, Vol. 22, No. 9 p 8