**Instructor:** Dessynie Edwards, Ph.D.  
**Syllabus:** EDAD 5374/6374 School Finance & Budgeting

**Educational Administration**  
**Office:** Faculty Center 221  
**Phone:** 361-825-5866 (Office) 361-825-3377 (Fax)  
**Email:** Dessynie.Edwards@tamucc.edu  
**Term:** Summer I- 2018 (5/25 - 6/28)  
**Room:** BH 202  
**Day &Time:** Tues. & Thurs/ 6:00 - 9:45 PM  
**Office Hours:** (By Appointment)

**COE MISSION STATEMENT**
The College of Education at Texas A&M University-Corpus Christi is devoted to excellence in instruction, research, and service, prepares leaders representing diverse backgrounds and experiences to serve the educational needs of the global community.

**COURSE DESCRIPTION**
This course is designed as an integral part of the Principalship Certificate Program and Master of Science in Educational Administration Program by focusing on 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 for fiduciary management of a campus.

**GENERAL DESCRIPTION AND ORIENTATION OF CLASS**
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. This course will contain online engagement. Students are expected to be able to utilize technology tools needed for success in this type of course delivery. Blackboard will be the primary means of communication of material and course discussions. Students are encouraged to access the IT Help Desk if you are unsure about how to access your Blackboard account. This is a graduate course. As such, the reading and requirements of this course are intensive and intended to build your knowledge and expertise in the area of school finance and budgeting.

**INSTRUCTIONAL OBJECTIVES**
As a result of activities, course readings, and interactive experiences, students will be able to:
- Effectively collaborate with peers, providing support through guidance, feedback, and reflective activities.
- Become more proficient in APA format and style.
- Understand the history and theory of school finance.
- Understand the financial duties and responsibilities of a campus principal.
• Understand the responsibility and the relationship between the campus principal, business manager, and superintendent in finance, budget development and management.
• Demonstrate a working knowledge of the shared decision making approach as related to the campus budget development process.
• Develop a campus budget.
• Demonstrate a working knowledge of the campus accounting process.
• Demonstrate a working knowledge of the campus auditing process.

This course covers the following Professional Standards for Educational Leaders (2015), formerly ISLCC (Interstate School Leaders Licensure Consortium Standards for School Leaders):

- PSEL Standard 2 – Ethics and Professional Norms
  Effective educational leaders act ethically and according to professional norms to promote each student’s academic success and well-being.
- PSEL Standard 3 – Equity and Cultural Responsiveness
  Effective educational leaders strive for equity of educational opportunity and culturally responsive practices to promote each student’s academic success and well-being.
- PSEL Standard 9 – Operations and Management
  Effective educational leaders manage school operations and resources to promote each student’s academic success and well-being.

This course also covers the following domains and competencies for the State Board of Educator Certification Texas Examinations of Educator Standards (SBEC/TExES) Framework for Principal Certification

**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 budgeting, accountability and management.
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

COURSE EXPECTATIONS
Engagement, participation, and active participation in class discussions and on-line discussion board forums are expected. It is expected that course discussions include respectful engagement, relevant content and productive inquiry. Although much of this class is independent, students are highly encouraged to form and contribute to professional, collegial networks. The academic arena is a perfect place to start these networks.

Course evaluations during the summer 2018 semester will be conducted at the end of the term. Completion of this instrument is encouraged as the results of course evaluations are used to enhance and improve the course structure and delivery methods. In addition to the professor’s use of evaluations, the University also uses course evaluations as a factor in evaluating a professor’s teaching effectiveness.

POLICIES
Classroom: Log in to Blackboard often and follow discussion threads on assigned readings and questions. Contact the instructor if you have any questions or concerns with the online classroom. Please be an active participant in class.

Communication: Email and Blackboard communication will be the best way to communicate with the instructor outside of class time. You can also schedule appointments for a meeting.

Statement of Academic Continuity: In the event of an unforeseen adverse event, such as a major hurricane, the University facilities (i.e., emails, web sites, and Blackboard) will be operational within two days of the closing of the physical campus. However, students need to make certain that the course instructor has a primary and a secondary means of contacting each student.

Technology-- Blackboard and Email: All assignments are to be uploaded onto the Blackboard by the due date at 11:59 pm of the assigned due date.

Assignment Format: All assignments are to be submitted electronically on Blackboard and in MS WORD format, not PDF. See APA Manual 6th Edition for all guidelines and formatting.

The CASA Writing Center: The Center for Academic Student Achievement writing center is a wonderful resource provided to all TAMUCC students. The writing center is available online and at their office hours and by appointment. If you are struggling in any way with writing for any course at TAMUCC, or would like an independent opinion of your writing to help you improve, please do not hesitate to use this resource. http://casa.tamucc.edu/wc_services.php

Late/Missed Assignments: All assignments are due on the date assigned unless other arrangements have been successfully negotiated with the instructor for compelling reasons. Late work will not be
accepted in this course.

**Illness/Emergencies/Unforeseeable Absences:** If an illness/emergency or unforeseeable circumstance arises and you cannot complete your online requirements of class, please email or call the professor as soon as possible.

**Accommodations:** The Americans with Disabilities Act (ADA) is a federal anti-discrimination statute that provides comprehensive civil rights protection for persons with disabilities. Among other things, this legislation requires that all students with disabilities be guaranteed a learning environment that provides for reasonable accommodations of their disabilities. If you believe you have a disability requiring an accommodation, please contact the Disability Services Office at (361) 825-5816 or visit the office in Driftwood 101. It is the student’s responsibility to register with Disability Services Office and to contact the faculty member in a timely manner to arrange for appropriate accommodations.

**Academic Honesty Policy.** Learning and teaching take place best in an atmosphere of intellectual freedom, openness, and honesty. University students are expected to conduct themselves in accordance with the highest standards of academic honesty. Academic misconduct for which a student is subject to penalty includes all forms of cheating, such as illicit possession of examinations or examination materials, falsification, forgery, complicity or plagiarism. (Plagiarism is the presentation of the work of another as one’s own work.) In this class, academic misconduct or complicity in an act of academic misconduct on an assignment or test will result in an “F” in the course. Texas A&M University- Corpus Christi is a community of scholars where integrity, excellence, inclusiveness, respect, collaboration, and innovation are fostered:

**Statement of Authorship**

The following statement must be completed and submitted on the bottom portion of the cover page for the critical reflection and the final research paper submitted for grading.

“I certify that I am the author of this paper titled ______________________ and that any assistance I received in its preparation is fully acknowledged and disclosed in the paper. I have also cited any sources from which I used data, ideas, or words, either quoted directly or paraphrased. I also certify that this paper was prepared by me specifically for this course and has not been submitted before in any class by me or anyone else. I understand that falsification of information will affect my status as a graduate student.”

**COURSE REQUIRED TEXTBOOKS**


Other resources and supplemental readings posted on Blackboard:

- Associated Press (2016). *Texas courts finds school funding flawed, but constitutional.*

Internet Sites and Internet Resources: Supplementary information for the course.

- [http://www.nces.ed.gov](http://www.nces.ed.gov) – National Center for Educational Statistics Website This is a good source of comparative financial information from throughout the United States. It also contains Handbook II Revision 2 of School Accounting for Local and State School Districts.
- [http://tea.texas.gov/Finance_and_Grants/State_Funding/Manuals/School__Finance_Manuals/](http://tea.texas.gov/Finance_and_Grants/State_Funding/Manuals/School__Finance_Manuals/) – This is a page on the Texas Education Agency website that contains School Finance Manuals.
- [http://www.nces.ed.gov/pubs2004/h2r2](http://www.nces.ed.gov/pubs2004/h2r2) -- This is the main link to Handbook II Revision 2. It is highly recommended that you read this handbook for a clear understanding of common budgeting and accounting procedure nationwide.
- [http://www.gfoa.org](http://www.gfoa.org)-- This is the Government Finance Officers Association link to evaluation of annual financial reports. The entire website has a treasure trove of governmental finance, news and information.

**COURSE REQUIREMENTS/EVALUATION CRITERIA**

- Case Studies…………………………………………………………………………………………………………………………10 points
- Critical Reflections…………………………………………………………………………………………………………………20 points
- Research Paper……………………………………………………………………………………………………………………20 points
- Research Paper and School Budget Presentation…………………………………………………………………………20 points
- Participation and Attendance……………………………………………………………………………………………………20 points
- **Total Possible Points**………………………………………………………………………………………………………………………100 points

**Grading Scale:** 90-100 = A, 80-89 = B, 70-79 = C, 69 and below is failing
Incompletes: Incompletes will not be given for this course.

COURSE ASSIGNMENT DESCRIPTIONS

Case Studies: 10 Points
Students will complete two case study assignments to demonstrate their level of understanding and proficiency in school finance and budgeting. The Case Studies will be posted on the course Blackboard site.

Critical Reflections: 20 Points
Each student will complete two Critical Reflections in a KWL Format to demonstrate what you know (K), what you what to know (W) and what you have learned (L) about school finance and budgeting. Students will provide specific questions and rationales for the area regarding “what you want to know”. Each Critical Reflection worth 10 points. The Critical Reflection Rubric in the syllabus appendix will be used to determine points earned.

Research Paper: 30 Points
Each student will complete a research paper on a topic related to “Ethics and Equity in School Budgeting.” The student will include the findings of the most current (within the last 10 years) research and publications in the field, on the ethical and equity considerations of campus budget development. Topics are due and posted at the end of Week 2. You need to have at least 4 references from peer-reviewed sources in your paper. The paper needs to be five to 7 pages in length; this excludes the cover page and references. You are to use double-spaced, 12-point Times New Roman font, one-inch margins, with no “extra” or “larger” spaces between paragraphs and use current APA style and formatting. Your paper will not be graded if written in an outline or if you present the information in a question/answer format. You need to use your writing skills to synthesize and present your thoughts logically and analytically. Use the outline below to guide your work and provide section titles in the paper. The outline will be used to determine points earned.

1. Cover page (Centered items & centered on the page; not counted in 5-7-page limit) [5 Points]
   a. Title of paper
   b. Name
   c. Course name, number and semester
   d. Professor’s Name (Dr. Dessynie Edwards)
   e. Date of submission
   f. Statement of Authorship (Bottom portion of page)
   e. Name of Peer Reviewer (first and last name) and Date of Peer Review

2. Introduction (approximately .5 – 1 page) [5 Points]
   a. Brief explanation of your experience with and/or knowledge of school finance and budgeting.
   b. Research-based statement of your perspective on the ethics and equity of school finance and budgeting
   c. Brief overview of the paper specifying the specific researched area of ethics and equity

3. Literature Review (approximately 4-6 pages) [10 Points]
   a. In this section, complete a literature review of the current literature (within the last 7 years) you found on the topic of choice
   b. Subtitles for the specific areas in the literature
   c. Direct quotes from literature must be accurately cited using APA format. APA format is
determined by the number of words in the direct quote. Explanations in the student author’s own words should introduce the quote and the student-author’s explanations after the quote should provide clarity for use of the quote.

4. **Conclusion** (approximately .5 – 1 page) [5 Points]
   a. Briefly summarize your research, findings, and personal perspective on supervision and administration and specifically the topic you chose.

5. **References** (does not count toward the 5-8-page limit) [5 Points]
   b. Must include (4) scholarly, peer-reviewed resources; which are those academic publications that have been assessed for quality, accuracy & validity of research methods and procedures by reviewers specializing in the same scholarly area as the author. Locate resources that are described as peer-reviewed publications.

**Research Paper and School Finance and Budgeting Presentation: 20 Points**
Each student will a.) identify and view a selected Texas school district’s school board finance and budgeting meeting or budget work session, b.) complete an analysis of the district’s finance/budgeting process and c.) provide implications for school/campus budgeting as related to the district’s budget. Additionally, the presentation will include d.) a brief review of the findings from the research paper. The presentation will be a maximum of eight (8) minutes, including time (1-2 minutes) for questions and answers. Students are expected to use creative and engaging presentation formats, inclusive of a minimum of three (3) and a maximum of seven (7) slides/frames. Students must be familiar with the presentation and prepare talking points; reading slides/frames is not permitted and points will be deducted. These detailed guidelines and components will be used to determine points earned.

**Class Participation and Engagement: 20 Points**
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 discussions, Blackboard discussion forums, research paper peer review and presentations. The *Class Participation and Engagement Rubric* in the appendix will be used to determine points earned.

**Canceled Class:** If a class session must be canceled due to bad weather or other unforeseen circumstances, the instructor will make every possible effort to contact students in sufficient time to avoid an unnecessary trip to class.

**Changes to Syllabus:** The instructor retains the right to modify this syllabus, if necessary, to meet the learning objectives of this course. Changes to this syllabus will be discussed with students and provided in as an addendum posted in Blackboard.
COURSE CALENDAR AND DUE DATES

Week 1-May 29  Syllabus Review and Questions & Answers

**Chapter 1-Understanding the Budgeting Process**
Introduction and Overview to School Finance

Week 1-May 31*  Blackboard: *Chapter 1- Discussion Questions & Case Study Application*

*Critical Reflection #1*- Due & Posted in Blackboard-7pm

Week 2-June 5  **Chapter 2**-The Budget-Vision Relationship and National Standards & **Chapter 3**- Culture, Data and Celebrating Success

Week 2-June 7*  Blackboard Discussion: *Chapter 2 and 3- Discussion Questions and Case Study Application*

*Case Study #1* posted in Blackboard by 7pm.

Week 3-June 12  **Chapter 4**- A Model for Integrating Vision, Planning and Budgeting and **Chapter 5**-Effective and Efficient Budgeting Practices

Week 3-June 14*  Blackboard Discussion: *Chapter 4 and 5 Discussion Questions and Case Study Application*

*Critical Reflection #2*- Due & Posted in Blackboard-7pm

Week 4-June 19  **Chapter 6** - Building the School Budget

Research Paper Draft- Due and Peer Review Completed

Week 4-June 21*  Blackboard Discussion

*Case Study #2* posted in Black Board

Week 5-June 26  *Research Paper and School Finance and Budgeting Presentations*

Week 5-June 28*  *Research Paper Final Document*- Due & Posted in Blackboard

**Bolded Week and Date**= In-Class/ Face-to-Face Class Meetings on Campus
# APPENDIX

**Appendix A: Critical Reflection Assignment Rubric (10 points)**

<table>
<thead>
<tr>
<th>Categories</th>
<th>Exemplary (2)</th>
<th>Acceptable (1)</th>
<th>Inadequate (0)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Connection to class discussions &amp; course objectives</strong></td>
<td>Synthesize, analyze and evaluate thoughtfully selected aspects of ideas or issues from the class discussions as they relate to topics.</td>
<td>Synthesize clearly some directly appropriate ideas or issues from the class discussion as they relate to topics.</td>
<td>Restate some general ideas or issues from the class discussion as they relate to topics.</td>
</tr>
<tr>
<td>“What You Know” <em>(K)</em></td>
<td>----------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------</td>
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<tr>
<td><strong>Self-disclosure</strong></td>
<td>Seeks to understand concepts by examining <em>openly</em> your own knowledge and experiences in the past as they relate to the topic, to illustrate points you are making. Demonstrates an <em>open, non-defensive ability to self-appraise</em>, discussing both growth and frustrations as they related to learning in class. Risks asking probing questions about self and topics, but does not provide rationales for these inquiries.</td>
<td>Seeks to understand concepts by examining <em>somewhat cautiously</em> your own knowledge and experiences in the past as they relate to the topic. Sometimes defensive or one-sided in your analysis. Asks some probing questions about self and topics, but does not provide rationales for these inquiries.</td>
<td><em>Minimal self-disclosure, minimal risk</em> in connecting concepts from class to knowledge and personal experiences. Self-disclosure tends to be superficial and factual, without self-reflection.</td>
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<tr>
<td>“What You Want to Know” <em>(W)</em></td>
<td>----------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------</td>
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<tr>
<td><strong>Connection to one’s outside experiences</strong></td>
<td><em>In-depth synthesis of thoughtfully selected aspects of readings related to the topic. Makes clear connections between what is learned from outside experiences, readings and the topic.</em> <em>Demonstrate further analysis and insight resulting from what you have learned from reading.</em> Includes reference to at least two readings from class. Includes readings other than those assigned for class.</td>
<td>Goes into <em>some detail</em> explaining some specific ideas or issues from outside experiences related to the topic. Makes <em>general</em> connections between what is learned from outside experiences, readings and the topic. <em>Go into more detail explaining some specific ideas or issues from readings related to the topic.</em> Makes general connections between what is learned from readings and the topic. Includes reference to at least one reading from class. Includes other readings than those assigned for class.</td>
<td>Identify some <em>general ideas or issues</em> from outside experiences, readings and the topic. <em>Identify some general ideas or issues</em> from readings related to the topic. No readings are included.</td>
</tr>
<tr>
<td><strong>Connection to readings (assigned and ones you have sought on your own)</strong></td>
<td><em>In-depth synthesis of thoughtfully selected aspects of readings related to the topic. Makes clear connections between what is learned from outside experiences, readings and the topic.</em> <em>Demonstrate further analysis and insight resulting from what you have learned from reading.</em> Includes reference to at least two readings from class. Includes readings other than those assigned for class.</td>
<td>Goes into <em>some detail</em> explaining some specific ideas or issues from outside experiences related to the topic. Makes <em>general</em> connections between what is learned from outside experiences, readings and the topic. <em>Go into more detail explaining some specific ideas or issues from readings related to the topic.</em> Makes general connections between what is learned from readings and the topic. Includes reference to at least one reading from class. Includes other readings than those assigned for class.</td>
<td>Identify some <em>general ideas or issues</em> from outside experiences, readings and the topic. <em>Identify some general ideas or issues</em> from readings related to the topic. No readings are included.</td>
</tr>
<tr>
<td><strong>What You Have Learned</strong> <em>(L)</em></td>
<td>----------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Validates how the reflective piece influences one’s thinking process contributing to practice, improvement, creation of schools that advocate for ALL children</strong></td>
<td>Includes explicit evidence of how one’s thought process regarding practice, improvement, creation of schools that advocate for all children is influenced</td>
<td>Includes implicit evidence of how one’s thought process regarding practice, improvement, creation of schools that advocate for all children is influenced</td>
<td>Includes minimal to no evidence of how one’s thought process regarding practice, improvement, creation of schools that advocate for all children is influenced</td>
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</tbody>
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### Appendix B: Class Participation & Engagement Rubric (20 points)

<table>
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<th>5</th>
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<tr>
<td><strong>Quality of Comments</strong></td>
<td>Timely and appropriate comments, thoughtful and reflective, responds respectfully to other student's remarks, provokes questions and comments from the group</td>
<td>Volunteers comments, most are appropriate and reflect some thoughtfulness, leads to other questions or remarks from student and/or others</td>
<td>Volunteers comments but lacks depth, may or may not lead to other questions from students</td>
<td>Struggles but participates, occasionally offers a comment when directly questioned, may simply restate questions or points previously raised, may add nothing new to the discussion or provoke no responses or question</td>
<td>Does not participate and/or only makes negative or disruptive remarks, comments are inappropriate or off topic</td>
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<tr>
<td><strong>Resource/Document Reference</strong></td>
<td>Clear reference to text being discussed and connects to it to other text or reference points from previous readings and discussions</td>
<td>Has done the reading with some thoroughness, may lack some detail or critical insight</td>
<td>Has not read the entire text and cannot sustain any reference to it in the course of discussion</td>
<td>Unable to refer to text for evidence or support of remarks</td>
<td></td>
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<tr>
<td><strong>Active Listening</strong></td>
<td>Posture, demeanor and behavior clearly demonstrate respect and attentiveness to others</td>
<td>Listens to others most of the time, does not stay focused on other's comments (too busy formulating own) or loses continuity of discussion. Shows consistency in responding to the comments of others</td>
<td>Listens to others some of the time, does not stay focused on other's comments (too busy formulating own) or loses continuity of discussion. Shows some consistency in responding to the comments of others</td>
<td>Drifts in and out of discussion, listening to some remarks while clearly missing or ignoring others</td>
<td>Disrespectful of others when they are speaking; behavior indicates total non-involvement with group or discussion</td>
</tr>
<tr>
<td><strong>Peer Review Research Paper</strong></td>
<td>Provides comprehensive and thorough review of peer’s assignment based on the required paper components, guidelines and requirements. Feedback is specific, aligned with requirements, and provides accurate comments and questions.</td>
<td>Provides thorough review of peer’s assignment based on the required paper components, guidelines and requirements. Feedback is specific, aligned with requirements, and provides comments and questions.</td>
<td>Provides thorough review of peer’s assignment based on the required paper components, guidelines and requirements. Feedback is somewhat specific, aligned with requirements, and provides some comments and questions.</td>
<td>Provides review of peer’s assignment based on one or two required paper components, guidelines and requirements. Feedback lacks specific, aligned with requirements, and provides some comments and questions.</td>
<td>Provides review of peer’s assignment based on the required paper components, guidelines and requirements. Feedback is specific, aligned with requirements, and provides accurate comments and questions.</td>
</tr>
</tbody>
</table>