**TEAL 6500 School Finance and Resource Management**

**Course Syllabus**

**Instructor: Jeff M. Stephens, Ph. D.**

**Office**: Weber School District

5320 South Adams Avenue Parkway

Ogden, Utah 84405

**Phone**: 801-476-7875

**Office Hours**: By appointment

**Email**: Through Canvas or at jstephens@wsd.net

**Biography**: Dr. Jeff Stephens began his career in education as a language arts and reading teacher at Wahlquist Junior High School in the Weber School District, where he taught for 10 years. Since becoming an administrator, he has held many administrative positions in public education, including high school assistant principal, junior high school assistant principal and principal, district curriculum director, assistant superintendent and district superintendent. He has been the superintendent of the Weber School District since 2011. Jeff earned his Master’s Degree from Weber State University in 1987 and his Ph. D. from Utah State University in 1994. Jeff has provided leadership throughout the state by chairing both the Northern Utah Curriculum Consortium (NUCC), as well as president of Utah ASCD. He also served on the international ASCD board of directors for three years where he was able to interact with school leaders and government officials throughout the world.

**Course Information**

**Course Goals**: TEAL 6500 School Finance and Resource Management focuses on the processes for, and the school administrator’s involvement in, generating, allocating and managing revenues and resources for public schools. Emphasis is placed on law and policy regarding school finance and resources managed by the public schools. The primary goals of this course are to provide students with an understanding of:

• Sources, ways and means of funding public schools;

• Policy issues surrounding the funding of public schools;

• Involvement of various policy-makers in the funding of public schools;

• Contemporary issues influencing the funding of public schools;

• Factors that go into building a budget in public schools; and,

• Policy issues for managing school resources, including personnel and physical facilities.

These course goals enable the student to accomplish the three major course objectives:

1. Gaining factual knowledge of school finance and resource management;

2. Developing specific skills, competencies and points of view needed by professional education leaders; and,

3. Learning how to find and use resources for answering questions or solving problems relative to school finance and resource management.

**Meeting Times**: TEAL 6500 School Finance and Resource Management is primarily an asynchronous, on-line course. There are, however, four required meetings of the class including the orientation meeting on the first Thursday of the semester. See the course schedule for the dates of the required class sessions. Additionally, there are weekly help sessions available to those wishing live interaction with the instructor. The required class sessions will begin at 5:00 p.m. on the designated dates. The weekly help sessions will be held on Thursday afternoons beginning at 4:30 p.m. Students join these sessions through the WebEx link in the left column menu of the Canvas home page for the course. Help sessions will focus on the topic(s) of the current module, with dialogue on relevant current, school finance issues. Questions addressing other modules may be addressed if time permits. If no students have joined the help session by 4:45 p.m., the session will be closed.

**Textbook**: *Financing Education in a Climate of Change*

Twelfth Edition

Vern Brimley, Jr.; Deborah A. Verstegen; Rulon R. Garfield

Allyn & Bacon

Copyright 2016

ISBN #: 978-0-13-391978-3 and/or 0-13-391978-1

Note: Be sure to have the Twelfth Edition. *I encourage the use of the e-book version; it is considerably less expensive.*

**Required Readings**: Annual Budget for your school district

Salary schedules for your district

Personnel Policies for your district

Annual budget for your school

Annual property tax notice (most recent, yours or someone you know)

State School Finance and Statistics Information

State Administrative Rules: R277 series

State Constitution

State education statutes or code (53A section)

Utah Educational Leadership Standards

Additional readings of contemporary articles on school finance issues may be assigned throughout the semester.

**Course Requirements**

**Modules**: The course is organized into one-week modules. This schedule allows students to begin the module, review the required readings and assignments, develop questions appropriate for the required class sessions or on-line help sessions held on Thursdays at 4:30 p.m. (see meeting times above), and still have time to complete the work of the module before the due date and time. Students may work ahead of the posted schedule for the course and are encouraged to do so as a means of managing their own time.

All work products are due by date and time indicated in Canvas. Work turned in after the due date and time may be penalized. Reading quizzes may not be taken after the due date and time indicated in Canvas.

**Assignments**: Seven assignments constitute a major portion of the student products for TEAL

6500 and are worth a combined total of 175 points. Other work products include discussion postings and participation, reading quizzes, and a final examination (see below). All assignments are submitted through Canvas. The eight assignments are:

1. Determining the financial magnitude of education in the state. (Magnitude of

Education Assignment) 20 points possible.

2. Determining the legal issues surrounding employment and supervision of teachers. (Employment Assignment) 20 points possible.

3. Determining funding streams for schools and classifying these streams according to restrictions accompanying the funds. (Minimum School

Program (MSP) Assignment) 20 points possible.

4. Determining the costs of changing education conditions and the impacts such changes would have on taxes. (Costs of Change Assignment) 20 points possible.

5. Examining and analyzing the budget for a school district as well as the student’s own district (or school, if from a charter or private school) budget.

(District Budget Assignment) 20 points possible.

6. Examining and analyzing the student’s own school budget, the processes by which it is built and managed, and the ways a school budget reflects UEL

Standards. (School Budget Assignment) Special Note: This is a substantial assignment. Completion of this assignment is required for completion of the course; i.e. credit for the course cannot be earned without completing this assignment. 30 points possible.

7. Examining the processes associated with using, caring for, and managing the building and grounds associated with the school. (Building Management Assignment) Special Note: Completion of this assignment is required for completion of the course; i.e. credit for the course cannot be earned without completing this assignment. 25 points possible.

Individual assignment sheets with detailed instructions to successfully complete the work are available in Canvas.

Assignment scores will be totaled and will account for 40% of the course grade.

**Reading Quizzes**: The amount of learning in any course is inherently reliant upon the individual student’s effort. Consequently, student reading and study of the specified materials along with completion of the assignments are critical if students are to gain the knowledge and perspective intended through asynchronous study of this subject. While the assignments draw on information from the readings, there will also be reading quizzes for some of the chapters of the textbook and other required readings associated with the learning module. Reading quizzes will be short, no pressure experiences. Students may use the textbook or other reading material to complete the quizzes. Quizzes are completed in Canvas. Reading quizzes may not be taken after the due date and time indicated in Canvas.

Combined scores of all reading quizzes is 140 points possible (2 points per question) and will account for 25% of the course grade.

**Discussions**: Some modules (e.g., Local Control and Federal Interest) include an online discussion requirement and are worth 15 points each. Students must participate in the on-line discussion to receive credit for this work product. To receive credit, a student’s posting must reflect thoughtful consideration of the topic in sufficient detail to indicate the student has interacted with (1) the course readings AND (2) the postings of other students. Very short posts of agreement or disagreement are unacceptable, as are posts that simply repeat the essential points of a previous post. Student postings to the discussion must reflect the student’s thinking and understanding of the topic, including connections to other topics in this course or others, the UEL Standards, practice within the student’s school and/or district, and may raise questions that would further the discussion. An on-line discussion is not a discussion unless there is some exchange and response to ideas posted by others; you will need to post more than once, and on more than one day to receive credit for participating in the discussion, but you need not post more than three times to receive full credit for the discussion. Class participation sessions require attendance during the class session for a live discussion. These sessions will be scored for attendance punctuality (5 points), involvement in the class session (5 points), and staying through the entire session (5 points). The Orientation Discussion is worth 10 points. Total Discussion Points = 100 points and are worth 25% of the overall grade.

**Final exam**: The final exam is a written product. Students are allowed to use all course materials as reference while taking the exam. The exam will be made available during a specific window of time during the last few days of the course. Students will be required to access the exam through Canvas, complete the exam, and submit through Canvas within the window of time specified.

The final exam is worth 50 points and the score will account for 10% of the course grade.

**Grading procedures**: Grading is based upon completion of the assignments, discussions and attendance, reading quizzes, and the final examination. Grading for all written work will consider the quality of the writing content as well as mechanics.

Assignments are intended to provide students with ability to understand and use information. Assignments (only assignments) receiving an initial grade of less than 85% may be corrected and resubmitted. The resubmission may receive up to 90% of the original total points possible. To qualify, the resubmitted assignment MUST (1) be the original assignment, (2) be amended in a different color font correcting the error(s) of the original submission, and (3) contain a brief explanation in a font color different from the original, showing what was done to correct those errors, clearly indicating the student understands the principle(s), concept(s), or point(s) at issue in the assignment.

Total points for student work products are weighted for the calculation of the final grade as follows:

Assignments (175 points) 40% of total grade

Reading quizzes (140 points) 25% of total grade

Discussions (100 points) 25% of total grade

Final exam (50 points) 10% of total grade

Final grades will be determined by summing the student’s weighted total points for all work products, and calculating a percentage of the weighted total points possible. Letter grades for the course will be determined as follows:

A 94% and above

A- 90-93%

B+ 87-89%

B 83-86%

B- 80-82%

I < 80%

Note: No one should score below 80% if the work is completed on time and with honest effort.

**Utah Educational Leadership Standards**

TEAL 6500 School Finance and Resource Management is designed to address the standards and performance expectations of the Utah Educational Leadership Standards. TEAL 6500 directly addresses Standard 3 and Standard 6. More generally, students will consider how finances and resources can be used to address each of the standards and performance expectations of the Utah Educational Leadership Standards.

**Students with Disabilities**

Reasonable Accommodation will be provided to qualified students with physical, emotional, sensory or learning disabilities through the Disability Resource Center (DRC). Alternate format materials (Braille, digital and large print) are also available. An application for DRC services is available at www.usu.edu/drc or by calling 797-2444 or toll free at 1-800-259-2966.

**Important Information Regarding Master’s Degree Program Restrictions: School of Teacher Education and Leadership**

The following restrictions should be understood by all students who are taking master’s level courses who have not been admitted to a master’s degree program:

• No more than 12 semester graduate credits taken prior to acceptance into a graduate program (“non-matriculated credits”) may be counted toward the master's degree. In some cases, students who are admitted to the program the semester they are taking coursework can, with special permission, bring the credits earned the semester of admission into their program.

• Six credits can be transferred into a master’s degree from another institution, but up to 12 may be allowed with prior approval.

• A maximum of 8 workshop credits can be counted as part of a master’s degree.

• Credit earned under ELED/SCED 5000, commonly reserved for in-service workshops, cannot be applied toward the master’s degree. Under no circumstances may 5000 level coursework from another institution be counted toward the master’s degree.

**Instructional Leadership MEd and ASC Program: Technology Statement**

The MEd in Instructional Leadership and the Administrative/Supervisory Concentration Program are delivered using a variety of technology tools and delivery systems. The use of technology tools is extensively integrated throughout the coursework to the extent that mastery of their use is required for successful completion of the program. These technology tools are consistent with those utilized in most school districts in Utah. Technology tools which you will need to master to successfully complete either the MEd or the ASC include:

1. Instructure Canvas Course management system;

2. WebEx Video Conferencing System;

3. Microsoft Word or a compatible commonly used word processing program;

4. Microsoft Excel or a compatible commonly used spreadsheet program;

5. Microsoft PowerPoint or a compatible commonly used presentation program;

6. Digital Video Projector; and,

8. Internet and web page navigation (You will not be required to create or manage websites).