I. Course Description
EDLE 6347 studies the significant principles of school finance, budgeting and accounting procedures, and financial situations common to local district administration.

Course Rationale:
School finance concerns the distribution and use of money to provide educational services and produce student achievement. Superintendents must have a basic understanding of the financing of public schools, including the practical details of national and Texas finance systems, local tax support, Federal resources, preparation and execution of an annual expenditure and revenue budget, and general school business and accounting functions. Moreover, successful superintendents must synthesize this knowledge within the context of equity issues, adequacy, and productivity issues, including what is known about the linkages among dollars, educational strategies, and student performance.

Course Topics:
The major topics that will be addressed in EDLE 6347 are:
1. Major legislation relating to school finance and current litigation of the Texas school finance system.
2. The history of school finance in Texas.
3. School finance terms and definitions. Adequacy and Equity in School Finance
4. School district budget procedures – including revenue and expenditure estimations. Budgeting
5. TEA Summary of Finance (SOF). Current Finance System
6. Utilization of Summary of Finance templates and data from TEA Financial Resources Online to accurately project revenue.
7. Annual district financial audit. Current Finance System
8. The impact of property taxation and the Comptroller’s Property Tax Division (CPTD) annual property value study on school districts. Taxation
9. Schools FIRST – Financial Integrity Rating System of Texas: Rating systems
10. Functions of the Budget Office in Public Schools
11. Financial forecasting and the future of school finance
12. Finance Elections

II. Intended Learning Outcomes/Goals/Objectives (Program/Student Learning Outcomes:

This course connects with the College of Education’s Conceptual Framework (CF) and Vision, Mission, Goals, and Core Values (VMGV) because it analyzes the role of the superintendent as the financial issues that impact learning for all students thus matching the College of Education’s (COE) theme of preparing professional educators who positively impact learning for all students. Additionally, the course connects with the COE vision for students striving to achieve professional excellence through exemplary programs as students who can understand and connect school finance. Further, the course matches the COE mission to prepare competent, successful, caring, and enthusiastic professionals dedicated to responsible service, leadership, and continued professional and intellectual development. Additionally, it connects with all COE values of academic excellence, life-long learning, collaboration, openness, integrity, and service. This course connects with the ELLC national standards and is one of the five superintendent courses. This course consists of the following Texas competencies for a superintendent.

Texas SBEC Competencies:

**DOMAIN I – LEADERSHIP OF THE EDUCATIONAL COMMUNITY**

**Competency 002**
The superintendent knows how to shape district culture by facilitating the development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by the educational community.

The superintendent knows how to:

d. use formal and informal techniques to monitor and assess district/school climate for effective, responsive decision-making.

e. institute procedures for monitoring the accomplishment of district goals and objectives to achieve the district’s vision.

f. facilitate the development, use, and allocation of all available resources, including human resources, to support implementing the district’s vision and goals.

**Competency 004**
The superintendent knows how to respond to and influence the larger political, social, economic, legal, and cultural context, including working with the board of trustees to achieve the district’s educational vision.

The superintendent knows how to:

a. analyze and respond to political, social, economic, and cultural factors affecting students and education.

b. provide leadership in defining superintendent-board roles and establishing mutual expectations.
c. communicate and work effectively with board members in varied contexts, including problem-solving and decision-making contexts.

e. access and work with local, state, and national political systems and organizations to elicit input on critical educational issues.

**DOMAIN III – ADMINISTRATIVE LEADERSHIP**

**Competency 008**

The superintendent knows how to apply effective leadership and management principles regarding district budgeting, personnel, resource utilization, financial management, and technology use.

The superintendent knows how to:

a. apply procedures for effective budget planning and management.

b. work collaboratively with stakeholders to develop district budgets.

c. facilitate effective account auditing and monitoring.

d. establish district procedures for accurate and effective purchasing and financial record keeping and reporting.

e. acquire, allocate, and manage resources according to district vision and priorities, including obtaining and using funding from various sources.

f. use district and staff evaluation data for personnel policy development and decision-making.

g. apply knowledge of certification requirements and standards.

h. apply knowledge of legal requirements associated with personnel management, including requirements relating to recruiting, screening, selecting, evaluating, disciplining, reassigning, and dismissing personnel.

i. manage one’s own time and the time of others to maximize the attainment of district goals.

j. develop and implement plans for using technology and information systems to enhance school district operations.

k. apply pertinent legal concepts, regulations, and codes.

**Program Learning Outcomes:**
The student will demonstrate the knowledge and ability to promote the success of all students by managing the organization, operations, and resources in a way that supports a safe, efficient, and effective learning environment.

**Assessment Method Based on the completion of assignments and discussion**

**Student Learning Outcomes:**

1. Completion of a budget review and analysis.

   Students must complete one project for inclusion in their portfolio. The project is a budget review and analysis to describe the context of the school district as it relates to Texas state standards and specific ELCC-NCATE standards of managing
the organization, operations, and resources. Students must carefully analyze the financial data from a school district to determine the strengths and weaknesses in the district.

2. Develop an understanding of the superintendent’s role as a visionary leader who facilitates successful superintendent-school board relations.

3. Demonstrate and apply knowledge of legal issues, policy development and implementation, and general characteristics of internal and external political systems.

4. Collaborate with the community to establish efficient and effective finances.

III. Course Assignments, Activities, Instructional Strategies, Use of Technology

Assignment 1: Financing Education Adequately and Equitably
30 points
Write and 6-8 page position paper on “Why it is important for school funding to be adequate and equitable.” Have at least four references, and use APA as your writing guide.

Assignment 2: Legislative Summary Update
50 points – (See assignment details in course Dropbox).

Assignment 3: District Budget Preparation Calendar
30 points
Make an appointment with your superintendent or business official and ask how they plan to prepare the annual district budget. Further details can be found in Dropbox. TBA – Zoom session to discuss budget planning process.

Assignment 4: Budget Review & Analysis -- 50 points (Submit to QClassroom)
Make an appointment with your superintendent or business official and ask for permission to study your school district’s prior year’s budget. Identify and analyze the sources of revenue. Assess the degree to which the district budget addressed the needs identified in the same year’s District Improvement Plan, focusing on how well the budget met the unique needs of students served by special programs and students who performed poorly on state-wide learning assessments. Determine to what level the school district has utilized Accountability Budgeting concepts such as Cost Benefit Analysis or Cost versus Benefit Analysis strategies in setting priorities within the budget. Report your findings in a written paper 10-12 pages in length.

Assignment 5: Summary of Finance
100 points
Download and print a copy of your district’s Summary of Finance (SOF). Secure a copy of the superintendent’s report from your PEIMS coordinator. Go to the Region 13 website and locate the Summary of Finance template for beginners and the latest updated available Summary of Finance Template. Complete a SOF template for your local district. To complete this assignment, you must make an appointment with the district office business manager or superintendent to review the SOF and obtain much
of the information needed to complete this report. Analyze the documents and report your findings to the instructor. Submit a copy of this template to the professor. In addition - Write a 12 -14 page paper analysis of any relevant documents needed for this report and report results. Include a copy of your district's SOF report.

Assignment 6: District Audit
50 points
Obtain a copy of your school district audit from your school district business office or the TEA website. Write an 8-10 page review and analyze what you learned from the audit. What did the district have to correct?

Assignment 7: Financial Integrity Rating Report
20 points
Obtain a copy of your district’s Financial Integrity Rating report from your school district business office or the TEA website. Write a 6 – 8 page review and analysis of what the report says about your district and what you learned.

Assignment 8: “Take the Mystery Out of Texas School Finance”
30 points
Read this monograph. Submit a 5 – 7 page reflection.

Assignment 9: Election or bond referendum
40 points
Interview a central office administrator, preferably a superintendent or assistant superintendent, actively involved in a school finance election or bond referendum. Instructions can be found in the School Finance Election Module.

IV. Evaluation and Assessments (Grading):
   Failure to submit QClassroom assignments of Budget Review and Analysis as Work Sample will result in a failing grade for the course

   Assignments completed after the due date may only receive up to 80% of the total grade. For example, if you would have otherwise made a 100 on a late assignment, you would receive an 80.

   Should a medical emergency or death in the family occur, it is the responsibility of the student to notify the professor immediately. Students will not be penalized for such events.

V. Readings (Required and recommended—including texts, websites, articles, etc.)
Required:


**Optional:**

**Other Sources and Websites:**
- [http://www.tea.state.tx.us/](http://www.tea.state.tx.us/)
- [http://www.tea.state.tx.us/finance.html](http://www.tea.state.tx.us/finance.html)
- [http://www.tea.state.tx.us/HB1/](http://www.tea.state.tx.us/HB1/)
- [http://www.nsba.org/site/index.asp](http://www.nsba.org/site/index.asp)
- [http://asbointl.org/index.asp](http://asbointl.org/index.asp)

**QClassroom Statement:** This course uses the QClassroom data management system to collect critical assessments for students who are Perkins College of Education majors (undergraduate, graduate, and doctoral) or majors in other colleges seeking educator certification through the Perkins College of Education. Support emails will come from qclassroom@sfasu.edu.

**VI. Course Evaluations:**

Near the conclusion of each semester, students in the Perkins College of Education electronically evaluate courses (the teaching itself and the content/assignments) taken within the PCOE. Evaluation data is used for various important purposes, including 1. Course and program improvement, planning, and accreditation; 2. Instruction evaluation purposes; and 3. Making decisions on faculty (full-time and part-time) annual evaluation processes, tenure, promotion, pay, and retention.

As you evaluate this course, please be thoughtful, thorough, and accurate in completing the evaluation. Please know that the PCOE faculty is committed to excellence in teaching and continued improvement. Therefore, your response is critical!

In the Perkins College of Education, the course evaluation process has been simplified and is completed electronically through MySFA. Although the instructor can view the names of students who complete the survey, all ratings and comments are confidential and anonymous, and summarized data will not be available to the instructor until after final grades are posted.
VII. Student Ethics and Other Policy Information:

Important course-related policies:

**Course Grades (Including WH), Policy 5.5**
**Final Course Grade Appeals by Students, Policy 6.3**
**Academic Accommodation for Students with Disabilities, Policy 6.1**
**Appeal Procedure Relating to the Provision of accommodations for students with Disabilities, Policy 6.6**
**Class Attendance, Policy 6.7**
**Code of Student Conduct and Academic Integrity, Policy 10.4**
***Other SFA Policy Information***

VIII: Resources

On-campus Resources:
SFASU Counseling Services • www.sfasu.edu/counselingservices
Health and Wellness Hub (corner of E. College and Raguet) • 936-468-2401

SFASU Human Services Counseling Clinic • www.sfasu.edu/humanservices/139.asp
Human Services Room 202 • 936-468-1041

Crisis Resources:
Burke 24-hour crisis line 1(800) 392-8343
Suicide Prevention Lifeline 1(800) 273-TALK (8255)
Crisis Text Line: Text HELLO to 741-741

IX: Additional Information Specific to Educator Preparation (only add if educator preparation):

Code of Ethics for the Texas Educator:

The Texas educator shall comply with standard practices and ethical conduct toward students, professional colleagues, school officials, parents, and members of the community and shall safeguard academic freedom. The Texas educator, in maintaining the dignity of the profession, shall respect and obey the law, demonstrate personal integrity, and exemplify honesty and good moral character. The Texas educator, in exemplifying ethical relations with colleagues, shall extend just and equitable treatment to all members of the profession. The Texas educator, in accepting a position of public trust, shall measure success by the progress of each student toward realization of his or her potential as an effective citizen. The Texas educator, in fulfilling responsibilities in the community, shall cooperate with parents and others to improve the public schools of the community. This chapter shall apply to educators and candidates for certification.
Please go to TAC 247.2 – Code of Ethics and Standard Practices for Texas Educators.

To complete Certification/Licensing Requirements in Texas related to public education and other professional settings, you will be required to:

1. Candidates must undergo a criminal history background check prior to clinical teaching and prior to employment as an educator. The public school campuses are responsible for completing the criminal background check. A person who is enrolled or planning to enroll in a State Board for Educator Certification-approved educator preparation program or planning to take a certification examination may request a preliminary criminal history evaluation letter regarding the person’s potential ineligibility for certification due to a conviction or deferred adjudication for a felony or misdemeanor offense.

A Preliminary Criminal History Evaluation is a non-mandatory, non-binding evaluation of an individual’s self-reported criminal history. In addition, the agency obtains your name-based Texas criminal history information. The service is provided to the requestor for a non-refundable fee. The requestor will receive an evaluation letter by email from agency staff advising of potential ineligibility for educator certification. You are eligible to request a Preliminary Criminal History Evaluation if:

- You enrolled or planning to enroll in an educator preparation program or
- You are planning to take a certification exam for initial educator certification, and
- You have reason to believe that you may be ineligible for educator certification due to a conviction or deferred adjudication for a felony or misdemeanor offense.

You are not eligible for a preliminary evaluation of your criminal history if you do not have a conviction or deferred adjudication for a felony or misdemeanor offense.

In addition, you must complete the fingerprinting process when you apply for certification. Participation in the evaluation does not preclude you from submitting to a national criminal history review at the time you apply for your educator certification. Your criminal history will be reviewed and you may be subject to an investigation based on that criminal history, including any information you failed to submit for evaluation.

2. Provide one of the following primary ID documents: passport, driver’s license, state or providence ID cards, a national ID card, or military ID card to take the TExES exams. YOU must provide legal documentation to be allowed to take these mandated examinations that are related to certification/licensing.
requirements in Texas. If you do not have legal documentation, you may want to reconsider your major while at SFASU.

3. Successfully complete state mandated a fingerprint background check. If you have a history of criminal activity, you may want to reconsider your major while at SFA.

For further information, contact the Office of Assessment and Accountability at 936-468-1282 or edprep@sfasu.edu.

X. Other Relevant Course Information

Refer to the online course CONTENT Page for additional information.

Communication and Response Time

When communicating by e-mail, please use the e-mail within D2L. In most cases, you can expect a response within 48 hours. You can also share by phone/text; in most cases, you can expect a response within 24 hours. If you communicate by text, please identify yourself and provide your section number.

QClassroom

QClassroom is the data management system used by the Perkins College of Education (PCOE) for program improvement and accreditation. Required program assignments must be submitted through QClassroom. Successful completion of the course and program depends on submitting all required QClassroom assignments.