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EDLD 556.01: The Finance of Public Education

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The University of Montana

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THE UNIVERSITY OF MONTANA

SCHOOL OF EDUCATION

Department of Educational Leadership and Counseling

EDLD 556

SCHOOL FINANCE

Three Credits

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EDLD 556: SCHOOL FINANCE

TEXT

[School Laws of Montana 2003 Edition](#)
[McCulloch, OPI. Helena, MT](#)

COURSE PURPOSE

The purpose of this course is to extend an understanding of school finance in such a way as to prepare the student for a leadership role in the successful preparation, calculation, and completion of a Montana public school budget. Particular attention will be given to maximizing additional resources in order to facilitate special needs students and other educational obligations to be best of a district's ability. Ongoing legislation during the 2005 session of the legislature will also be covered and evaluated in regard to its impact upon school funding.

COURSE OF OBJECTIVES

To help enable the student to:

1. understand financial concepts and terminology,
([OPI 10.58.704.f](#))
2. utilize computer software as a tool to prepare school budgets,
([OPI 10.58.704.c.v](#))
3. utilize Internet for downloading and transmitting school budget data,
([OPI 10.58.704.c.v](#))
4. develop and apply an understanding of MT laws regarding the parameters of public school finance,
([OPI 10.58.704.f.v](#))
5. develop and apply an understanding of MT accreditation standards in the preparation of school budgets,
([OPI 10.58.704.f.v](#))
6. allocating human, material, and financial resources efficiently,
([OPI 10.58.704.f](#))
7. prepare a budget suitable for public explanation of school budget.
([OPI 10.58.704.b.i](#))

COURSE OUTLINE

Topics:

1. Revenue
 - A. Local
 - B. County
 - C. State
 - D. Federal
 - E. Special Levies
 - F. Bond Levies

Activities/Assignments

- T Students will study different revenue models and sources. Students will utilize computer software as a means of analyzing revenue and projecting information regarding its relative importance to the budgeting process.

- 2) Outlays by Fund
 - A. General Fund
 - B. Special Education
 - B. Transportation
 - C. Retirement
 - D. Building Reserve
 - E. Federal
 - F. Other Funds

Activities/Assignments

- T Students will develop appropriate budgets given necessary assumptions. Each student will computerize a school budget and analyze the accuracy and appropriateness of each line item. Budgets will be built within legal and accreditation parameters that reflect the direction of leadership taking place in that district.

Students will also be required to postulate an improved model for financing public education.

3. Internet Procedures

Activities/Assignments

T Students will download data from state websites for utilization in assignments.

INSTRUCTIONAL METHODS

Instructional methods will utilize "hands on" as the primary means of learning. Lectures, student presentations, cooperative learning, discussions, and individual/group research will also be employed. Computer technology will be employed at all times.

EVALUATION CRITERIA

- 1) Class participation ---- Students will be expected to attend all classes, interact verbally, and develop discussion beyond the level of the text and/or presentations.
- 2) Assignments ---- Students are expected to complete all assignments in a timely manner. Assignments are to be turned in reflecting very high quality of thought and content. Due dates will be noted at the time of the assignments.
- 3) Major assignments ---- Students will prepare a class presentation on an assigned topic and develop a school budget.
- 4) Final Examination ---- The final examination will be on the last day of class.
- 5) Missed Classes --- Class discussion is essential to the course, therefore, missing class can be expected to impact your final grade.

Software Utilized in the Course

Excel

FIELD EXPERIENCE

Each student is required to complete a substantial amount of work “in the field” as part of the class. This work must be related to the contents of this course, that is, it should involve statistical analysis. It can be integrated with work that your district is presently doing or it can be something that you choose to do based upon research interests you have. This work is considered an important part of the course with completion of the fieldwork required in order to pass the class. You will need to decide early in the course what you would like to do for this requirement, secure the necessary permission, and obtain supervision, if necessary.

You will need to spend at least 15 hours doing some research based activities in your school. There are many research requirements based upon NCLB that might serve as the underlying purpose of your research for many of you. A good source of ideas is to ask your supervisor for action research that would be useful to the school or organization. To document your completion of this requirement, please have someone in your school who has knowledge of the work and time you have spent upon this activity sign a statement to that effect. You do not need to submit a log of your activity but you do need to turn in a paper describing what you did and what you found.

PORTFOLIO PROJECT

Each course in the M.Ed. requires an artifact associated with that course to be part of your portfolio that you will complete prior to graduation. This portfolio and a presentation of your portfolio to a committee of three (two professors and one administrative practitioner) have now replaced the old written comprehensive examinations. These artifacts are then submitted on CD and on paper for your portfolio. You should make sure that you determine and complete each required artifact for each of the 12 required classes for your degree.

You must have completed at least 8 of the 12 courses and artifacts from all courses completed present in your portfolio prior to presenting your portfolio. With permission of appropriate instructors, you may synthesize two or more of your courses into a single artifact. You will need appropriate professors to sign off that each artifact meets an acceptable standard before it can be submitted in your portfolio. More detailed information regarding your portfolios is available from the administrative assistant at 406-243-5586. **This information contains a check off list and other requirements which must be received two weeks prior to setting a date for your portfolio presentation. While you may present with as few as eight courses represented in your portfolio, you must have all 12 represented prior to graduation.**

Artifacts for each course will be required to include specific Interstate School Leaders Licensure Consortium (ISLLC) standards that have been met by the project and a brief rationale for how that standard was met. Breaking out the standards into the Knowledge, Disposition, and Performance indicators and denoting those that have been met is anticipated to be the best way to meet this requirement.

Both the portfolio and presentation are expected to be of high professional quality. The presentation must show graduate level synthesis of the courses with an active integration of ISLLC standards, educational authorities, and relevant authors as appropriate. A student whose presentation does not pass is permitted to repeat the presentation in accordance with department rules available from the EDLD administrative assistant at 406-243-5586.

Any student taking this class who does not intend to graduate with a master's degree in educational leadership is not required fulfill portfolio requirement.

IMPORTANT NOTICE

Students may work together or independently on assignments. However, all work turned in must be original. **Assignments that are duplicates or, in my judgment, clones with a few minor changes, will be returned without credit or grade.** No work may be plagiarized. If you are quoting another source, you must cite the source.

School Finance References

2003 State Law

OPI Web Site -- metnet.state.mt.us

Alexander & Salmon (1995). Public school finance.

Ascher, Fruchter, Berne, (1996). Hard lessons: public schools and privatization

Bowman & Kearney, (1996). Financing education in a climate of change.

Hack, Candoli, & Ray, (1998). School business administration.

Garms, (1978). School finance: the economics and politics of public education.

Jean, (1988). Montana school finance 1864 to 1988.

Johns, R. (1983). The economics and financing of education.

Loble, (1989). MT District Court School Equity Decision

Odden, A. (1999). Improving state school finance systems.

Odden, A. (1983). School finance and school improvement.

Odden, A. (1983). School finance reform in the states.

Odden & Picus, (1999). School finance.

SCHOOL OF EDUCATION MISSION STATEMENT

The School of Education shapes professional practices that contribute to the development of human potential. We are individuals in a community of lifelong learners, guided by respect for knowledge, human dignity and ethical behavior. To advance the physical, emotional, and intellectual health of a diverse society, we work together producing and disseminating knowledge as we educate learners.

EDUCATIONAL LEADERSHIP MISSION STATEMENT

The mission of Educational Leadership at The University of Montana is to develop leaders for learning organizations who are guided by respect for knowledge, human dignity, and ethical behavior. This is accomplished by providing high quality academic and professional opportunities. We subscribe to a definition of leadership wherein individuals assume evolving roles within influence relationships requiring their contributions in order to achieve mutual purposes.

ISLLC STANDARDS USED IN THIS COURSE

The primary ISLLC Standard addressed by this course is:

Standard 3. A school administrator is an educational leader who promotes the success of all students by ensuring management of the organization, operations, and resources for a safe, efficient, and effective learning environment.

However, each of the other five standards is indirectly addressed by what is learned in this course and should be recognized in your fieldwork and portfolio project when appropriate.

Students are required to reference the ISLLC standards contained in this syllabus and any others they have developed in their work in the course, and reference those standards in their presentation to their portfolio committee.

PROFESSIONAL STANDARDS FOR STUDENT PERFORMANCE

Graduate students in the Department of Educational Leadership at The University of Montana are expected to:

- Demonstrate professional vision in the practice of educational administration
- Accept responsibility and accountability for class assignments in their role as members of the class
- Demonstrate growth during the period of their graduate career
- Demonstrate good decision making and an awareness of organizational issues from a variety of perspectives
- Demonstrate imagination and originality in the discussion of educational leadership issues
- Understand the relationship between theory and practice and the value of reflective leadership
- Demonstrate a moral, humanistic, ethical and caring attitude toward others
- Demonstrate an ability to build trust and positive relationships with others
- Demonstrate a tolerance for diversity and a warm acceptance of others regardless of their backgrounds or opinions
- Demonstrate emotional stability and an ability to work well with other members of the class, including the instructor
- Demonstrate an ability to express himself/herself well in speech and writing, and
- Demonstrate mastery of fundamental knowledge of course content and an understanding of its application

**FAILURE TO DEMONSTRATE THE AFOREMENTIONED QUALITIES ON A CONSISTENT BASIS MAY
RESULT IN REMOVAL FROM CLASSES AND/OR THE EDUCATIONAL LEADERSHIP PROGRAM.**