

**The University of Georgia**  
College of Education

Department of Lifelong Education, Administration, & Policy  
Program of Educational Administration & Policy

Dr. Jim Willis

Spring 2006

EDAP 7060 School Business and Resource Management

**Communications:**

Phone: (706) 485-5381 (voice mail)

Fax: (706)

Address: Putnam County Schools  
158 Old Glenn Springs Road  
Eatonton, GA

email: [drwillis@uga.edu](mailto:drwillis@uga.edu) or [jim\\_willis@putnam.k12.ga.us](mailto:jim_willis@putnam.k12.ga.us)

Office Hours: by appointment.

Students are expected to **check regularly** the website for this class for assignments and other postings. EDAP 7060 Website: <https://webct.uga.edu>

*The course syllabus is a general plan for the course; deviations announced to the class by the professor may be necessary.*

**Course Description:** Business management functions, with emphasis given to the budgeting process, accountability, and educational efficiency.

The purpose of this class is to provide students with an understanding of the role of school business management in the functioning of a local school system. While emphasis will be placed on budgeting, in both its theoretical and practical application, the course will also include an overview of the support function of school systems and discuss issues of accountability and efficiency. After completing this course, the student should be able to:

1. Understand a budget document.
2. Understand the purposes of accounting.
3. Prepare a building level budget.
4. Understand the linkage between instruction and resource management.
5. Analyze an educational issue, in particular noting the associated resource allocation issues.
6. Make an oral presentation summarizing the key points of the educational issue.
7. Analyze and evaluate the budgeting process at the school site.
8. Evaluate issues that are germane to school business management such as the privatization of educational services, the costs and benefits of services such as transportation, food services, special and compensatory education.
9. Understand issues of accountability, equity, efficiency, and adequacy in using school system monies.

### **Required Reading:**

David C. Thompson & R. Craig Wood. *Money and Schools*, 3<sup>rd</sup> Edition. (Larchmont, NJ: Eye on Education, 2005).

Examination of Resource Allocation in Education: Connecting Spending to Student Performance. *Examination of Resource Allocation in Education: Connecting Spending to Student Performance*. This reading can be accessed at

**[http://www.sedl.org/rel/pr\\_resources.html](http://www.sedl.org/rel/pr_resources.html)**

It is the first document listed there.

*Financial Accounting for Local and State School Systems*, Chapter 4, 3,& 8; <http://nces.ed.gov>  
Click on Electronic Catalog. Type in NCES #: 2004318.

Gary Natriello & Edward McDill, "Title I: From Funding Mechanism to Educational Program," 1999. Class Packet

Chaikind, S. (2001). Expanding value added in serving children with disabilities. In S. Chaikind & W. Fowler, Jr. (Eds.), *Education Finance in the New Millennium* (pp. 67 - 79). New York: Eye on Education. – Class Packet.

Addonizio, M. F. (2001). New revenues for public schools: Blurring the line between public and private finance. In S. Chaikind & W. Fowler, Jr. (Eds.), *Education Finance in the New Millennium* (pp. 159-171). New York: Eye on Education. – Class Packet.

Brent, B. O. & Lunden, S. (2005). Rethinking school commercialism: Who or what comes first? *School Business Affairs*, 71(7), 11-14. Class Packet

Brent, B. O. & Pijanowski, J. C. (2003). Shaking the tree: The benefits (and costs) of district education foundations. *School Business Affairs*, 69(5), 6-10. Class Packet

Zimmer, R. W., Krop, C., & Brewer, D. J. (2003). Private resources in public schools: Evidence from a pilot study. *Journal of Education Finance*, 28, 485-522. – Class Packet.

### **Obtain the following:**

A school district budget for 2005-2006 – this should be the summary document that was made available for the public budget hearing.

A school level budget – if possible.

**It will help to bring a calculator to class!!**

### **Websites:**

EDAP 7060 Website: <https://webct.uga.edu>

Check for **announcements, assignments, etc.**

University of Georgia Library: <http://www.libs.uga.edu>

Georgia School Superintendents Association: <http://www.gssanet.org>

Georgia Department of Education: <http://www.doe.k12.ga.us>

National Center for Education Statistics: <http://nces.ed.gov>

National Policy Board for Educational Administration: <http://www.npbea.org>  
Education Leadership Constituent Council (ELCC standards)

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**Suggested Sources for Additional Reading:**

*American School Board Journal*  
*Educational Administration Quarterly*  
*Educational Evaluation and Policy Analysis*  
*Educational Leadership*  
*Journal of Education Finance*  
*Management Review*  
*National Association of Secondary School Principals*  
*Phi Delta Kappan*  
*Public Administration Review*  
*School Business Affairs*

**I. Class Assignments/Class Participation – 30 points**

A series of assignments to guide in understanding and using the material covered in class are to be completed. Most of these assignments will be completed in class; however, some assignments may require preparation of a short paper to bring to class.

In case of absence, assignments will be posted on the website: EDAP 7060 Website: <https://webct.uga.edu> or I will email you. Assignments missed due to absence **MUST** be submitted no later than the day of the class meeting following the absence.

**II. Paper/Presentation of School Resource Management or School Finance Issue – 50 points**

Each student will write a paper on a topic pertinent to this class. The paper is to be well researched using both scholarly and practitioner oriented journals. The Internet may be used with caution. **You MUST use a citation from the National Center for Education Statistics (NCES).**

Topics **must** be approved by me no later than **January 16th**. I will assign topics to those who are undecided. (5 points)

A tentative reference list (no fewer than 5), written in APA style must be submitted no later than **February 2nd**. (5 points)

Two pages of the paper (including citations) must be submitted no later than **February 16th**. (5 points)

Presentations (approximately 5-10 minutes) will be **April 6, 13, and 20**. (10 points)

The written paper must have a title page and a reference page. Standard font and one inch margins are the norm. Students will use APA style, 5<sup>th</sup> edition. Papers should be about 7-10 pages. **Due April 10th**. (25 points)

This assignment is aligned with ELCC standards 3.3 (managing resources) and 6.1 (understanding the larger context of education).

THIS ASSIGNMENT MAY BE USED AS PART OF THE PORTFOLIO REQUIREMENT FOR THE MASTERS AND SPECIALISTS ORAL EXAM

### **III. Analysis of Budgeting at Your School – 50 points**

Students will investigate and analyze the resources available at their school sites. The assignment contains four parts: Determining the fiscal resources available at the school site; determining the scope of budgeting authority at this school site; determining the processes used to allocate the available resources and making the connection between theory and practice; and determining a link to budgeting and leadership and reflecting on how this process might be improved.

Specifics for this assignment will be given at the appropriate time.

This assignment is aligned with ELCC standard 6.2 (responding to the larger context)

### **IV. Building Level Budget –50 points**

Students will develop a building budget, including staffing, benefits, supplies, etc. The budget will include documentation showing how numbers were derived and descriptions of how decisions were made. Students will use real school system data in developing this budget. This is a group project, and there will be class time available to complete most of this assignment.

Evaluation of this project will include the document itself, a brief class presentation, and conduct as a group member. Complete instructions and materials will follow.

This assignment is aligned with the ELCC standards 3.1 (managing the organization); 3.2 (managing operations); 3.3 (managing resources); 4.1 (collaborating with families and other community members); 4.2 (responds to community interests and needs); 4.3 (mobilizing community resources); 5.3 (acts ethically); 6.1 (understands the larger context of education).

#### **V. Reflective Journal – 40 points**

Each student will maintain a reflective journal of thoughts and attitudes toward the major concepts and issues discussed in the course. Students should identify an idea or belief in their journal *each week* relative to the topics under discussion in class. There is room for flexibility in the format used, but students should consider the following four items in each week's entry:

- Describe the learning event or belief in a few sentences.
- Identify the new learning concepts in this situation for you.
- What were your beliefs about the topic prior to the time you experienced it?
- What questions or ideas emerged from the new learning that challenged your former belief?

Journals will be submitted 3 times during the semester: **Feb 2nd, March 16th, and April 13th**. Be sure to date each entry.

Note: The one for Feb 9<sup>th</sup>, would include entries for January 12<sup>th</sup>, 19<sup>th</sup>, 26<sup>th</sup> and February 2<sup>nd</sup>. The one for March 16<sup>th</sup> would include entries for February 16<sup>th</sup>, 23<sup>rd</sup>, March 2<sup>nd</sup> and 9<sup>th</sup>. The one for April 13<sup>th</sup> would include entries for March 16<sup>th</sup>, 23<sup>rd</sup>, 30<sup>th</sup> and April 6<sup>th</sup>.

This assignment aligns with the NCATE standards to address changes in dispositions, perceptions, and beliefs about educational administration.

THIS ASSIGNMENT MAY BE USED AS PART OF THE PORTFOLIO REQUIREMENT  
FOR THE MASTERS AND SPECIALISTS ORAL EXAM

**Academic Honesty:**

*All academic work must meet the standards contained in “A Culture of Honesty.” All students are responsible for informing themselves about those standards before performing any academic work.* [http://www.uga.edu/ovpi/academic\\_honesty/culture\\_honesty.htm](http://www.uga.edu/ovpi/academic_honesty/culture_honesty.htm)

<http://www.uga.edu/ovpi/honesty/ah.pdf>

NEW web address.

**Grading:**

All work is to be submitted on the due date unless other arrangements have been made. **NO** exceptions will be made for the Class Activities as these will be available on the web. I make every effort to return papers within a week and provide feedback and comments. Students are expected to use good grammar, spelling, etc. As a future educational leader, it is important to display basic communication skills. Students who submit the resource management issue papers **at least one week before the due date** will have the opportunity to re-write without penalty. Papers will be evaluated based on focus, coherence, logic, evidence, and accuracy.

The following grading scale (based on points) will be used:

200-220 = A  
180-199 = B  
160-179 = C  
less than 160 = F

A grade of Incomplete will be given only in extenuating circumstances and in accordance with Graduate School Policies.

**Attendance Policy:**

I understand that everyone needs to miss an occasional class. As a teacher, I work to structure class so that time is used effectively; therefore, absence from class should mean that the student misses information and experiences that are vital to the learning process. In the event of an absence, I would appreciate notification (if possible) that you will be unable to attend class. I

suggest that you find someone in the class you can rely on to get notes and information in the event of an absence. Naturally, excessive absences (more than 2) will affect your grade.

Class activities will be posted on the class website. If you are absent, you are expected to access the website and complete the missed activity.

### **The Conduct of Class:**

I encourage the open discussion of ideas. All students are to be respected, and no one person should dominate the discussion. It is my belief that public education today exists in a challenging environment. The college classroom is an excellent place to discuss all sides of an issue. I encourage you to come to class with an open mind, a willingness to listen to what others have to say, and a willingness to contribute to the conversations. I like to play the devil's advocate and to challenge commonly held beliefs about the way schools are run. I hope we can create a classroom atmosphere that is challenging in the most positive way.

*Students with Disabilities who require reasonable accommodations in order to participate in course activities or meet course requirements should contact the professor.*

**Class Meetings** – Readings are to be read *prior* to class. In some cases, data are to be downloaded and brought to class for discussion and use during class time.

1. January 9                    Introduction.
2. January 16                Readings: *Schools, Values, and Money*, Chapter 1, **AND** pp 40-43 in Chapter 2.

**Paper topics due.**

**BRING THE FOLLOWING DOCUMENTS WITH YOU TO CLASS:**

NCES website; Tables <http://nces.ed.gov>

Click on “Ed Stats at a Glance”

Then, access The Digest of Education Statistics 2003

Click on “List of Tables”

Go to Chapter 2 – Click on Revenues and Expenditures

Download Tables 156, 157, 162, and 166.

It is easiest to download as pdf files

Now go to the Georgia Department of Education (GaDOE) website:

<http://www.doe.k12.ga.us>

On bottom of page, left side- find “System Guides.” Click view.

On right side of page – click OSA Report Card

Click 2003-2004 Report Card

Left side – click K-12 Public School Report Cards

Click STATE summary.

Click Personnel & Fiscal. **Print** Fiscal Data

Now go to School System Reports

Find your school system

Click Personnel & Fiscal. **Print** Fiscal Data

3. January 23            Readings: *Funding Schools: A Policy Perspective*, Chapter 2.

***DUE AT THE BEGINNING OF CLASS***

Write a short paper (no more than 1 page), summarizing the scholarly debate about “does money matter?” This paper needs to be written in *your own words* using the information on pages 9-16 of the text. Key items of discussion to be considered are: production-function, the Coleman Report, the work of Hanushek, the work of Laine, Greenwald & Hedges, and other pertinent information .

4. February 2            Readings: *Basic Funding Structures*, Chapter 3.  
Georgia Funding System; **download “QBE”** from class website and bring to class.

**Journals due.**

5. February 9            Continuation of September 13<sup>th</sup> topics.

**Reference List due.**

6. February 16            Readings: *School Funds Accountability & Professionalism*, Chapter 4  
(Text)  
**and**  
*Financial Accounting for Local and State School Systems*, Chapter 4;  
download from NCES website (see instructions on page 2 of syllabus)

7. February 23            Readings: *Budget Planning*, Chapter 5.  
**and**  
*Financial Accounting for Local and State School Systems*, Chapter 3;  
download from NCES Website.

**Review of School District Budgets.**

8. March 2                    *Readings: Site-Based Leadership*, Chapter 12;  
  
    *Examination of Resource Allocation in Education: Connecting Spending to Student Performance*. This last reading can be accessed at  
    [http://www.sedl.org/rel/pr\\_resources.html](http://www.sedl.org/rel/pr_resources.html).  
    It is the first document listed there.
- 2 pages of research paper due.**
- Journals due.**
9. March 9                    *Readings: Budgeting for Personnel*, Chapter 6.  
    *Budgeting for Instruction*, Chapter 7.
- March 16.....Spring Break
10. March 23                    Chapter 10 – the section on Food & Nutrition  
    Federal Funding Programs; Title I and Special Education.  
    *Readings: (all handouts)*
- Title I: From Funding Mechanism to Educational Program;*  
    *Expanding Value Added in Serving Children with Disabilities.*
11. March 30                    *Readings: Budgeting for Transportation*, Chapter 10
- ANALYSIS OF BUDGETING AT YOUR SCHOOL**

12. April 6                    *Readings: Budgeting for Student Activities*, Chapter 8;  
  
*Financial Accounting for Local and State School Systems*, Chapter 8;  
download from NCES website.  
  
*New Revenues for Public Schools: Blurring the Line Between Public and  
Private Finance*;  
  
*Private Resources in Public Schools: Evidence from a Pilot Study*;  
*Shaking the tree: The benefits (and costs) of district education  
foundations.*

**Journals due.**

13. April 13                    **BUILDING BUDGETS DUE.**

*Presentations*

14. April 20                    *Readings: Budgeting for School Infrastructure*, Chapter 9;  
  
*Financing School Infrastructure Needs – Class Packet.*

*Presentations*

**Journals due.**

15. April 27                    *Readings: Future Trends in School Funding*, Chapter 13.

*Presentations*

**SCHOOL RESOURCE MANAGEMENT ISSUE PAPER DUE**