

**The University of Georgia**  
College of Education

Department of Educational Administration & Policy

Dr. Catherine C. Sielke  
Summer 2004

***EDAP 8080 School Finance***

**Communications:**

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Conferences: At mutual convenience; please schedule in advance.

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

**Course Description:**

Analysis of intergovernmental transfers of resources for public education. Concepts of equity, equality, and adequacy will form the basis for analysis. Students are expected to:

1. understand the concepts of equity, equality, adequacy, and efficiency in school finance.
2. have a basic, introductory understanding of tax theory.
3. understand the theory of human capital.
4. understand the concepts and mechanics of intergovernmental transfers.
5. understand of the impact of school finance litigation in the United States
6. understand how education finance policy is developed.
7. understand the nexus of high stakes testing, accountability and school finance.

**Required Reading:**

Textbooks:

Monk, D. H. & Brent, B. O. (1997). *Raising Money for Education: A Guide to the Property Tax*. Thousand Oaks, CA: Corwin Press, Inc.

Ladd, H. F., Chalk, R., Hansen, J.S. (Eds.). (1999). *Equity and Adequacy in Education Finance: Issues and Perspectives*. Washington, DC: National Academy Press.

### **IMPORTANT WEBSITES:**

**The Class has a website:** Students are expected to **check regularly** the website for this class for information and other postings. Do NOT send me email through the website.

EDAP 8080 Website: <http://webct.uga.edu>

The National Center for Education Statistics (NCES) <http://www.nces.ed.gov> also <http://www.nces.gov/edfin/>

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

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

Consortium for Policy Research in Education: [http://www.cpre.org/index\\_js.htm](http://www.cpre.org/index_js.htm)

### **Assignments:**

Details for all of these assignments will be forthcoming.

#### **I. Class participation (10 points)**

Participating in class/web discussions, making presentations, and working in groups is very important in this class. Failure to attend and/or participate will mean loss of points in this area.

#### **II. Presentation of a State's (other than Georgia) Financing System (30 points)**

Students will make an oral presentation on how a state other than Georgia funds its public K-12 education system. States will be selected based on their litigation history and will serve as examples of how equity and adequacy lawsuits impacted funding.

#### **III. Adequacy Study (30 points)**

Students will work in groups to analyze Georgia's funding system based on adequacy. Further details will follow.



#### IV. Written paper/presentation (30 points)

Each student, in consultation with me, will be assigned/select a topic to research and then present to the class. Ideally, these presentations will greatly enhance our class discussions and will be given to match the topic dates in the syllabus. The written part will be due the last class meeting.

*Suggested topics are:* Title I/NCLB funding; Special Education funding; Career & Technical funding; Food & Nutrition funding; Class Size Reduction; Choice; Whole School Reforms; Assessment & Accountability; Value-Added; Financing school facilities; Rural school funding; ESOL funding; Early Childhood Funding Programs. Anyone interested in funding high schools in Georgia???

I have lots of materials I can share. The CPRE website has excellent up-to-date research. There are some other very good websites to access as well. Also some suggested reading sources are:

*Journal of Education Finance*  
*Educational Evaluation and Policy Analysis*  
*Phi Delta Kappan*  
*Economics of Education Review*  
*Educational Policy*  
*American Journal of Education*  
*Education Administration Quarterly*  
*National Tax Journal*  
*American Economic Review*  
*American Educational Research Journal*  
*Planning and Changing*  
*Educational Researcher*  
*Journal for Personnel Evaluation in Education*  
*Policy Analysis*

#### **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. (See <http://www.uga.edu/~vpaa>)

**Attendance Policy:**

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. All class activities must be made up. Naturally, excessive absences will affect your grade.

**The Conduct of Class:**

Because this is an advanced graduate course, the class will be conducted as a seminar. This means that your active participation is vital. Students are expected to come to class having read the assigned material and ready to contribute with materials they may have read for their papers, etc.

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.

**Grading Policy:**

The following grading scale will be used:

90 - 100 = A	A grade of Incomplete will be given only in extenuating circumstances.
80 - 89 = B	
70 - 79 = C	
60 - 69 = D	

I will gladly read drafts of papers. Students may re-submit or re-write papers/projects without penalty **IF** the assignment is submitted **ON OR BEFORE THE DUE DATE**.

**Class**  
**Meetings**      **Dates & Assignments**

1 & 2      **June 11 & 12**

Introduction. Money for education; Tax theory.

Discussion will focus on how much money is spent on education; how that money generated; and basic tax theory.

**Read: Monk & Brent – all of it.**

**Download & bring to class:**

NCES Data: <http://nces.ed.gov>

Click on “Ed Stats at a Glance”

Then, access [The Digest of Education Statistics 2002](#)

Click on “List of Tables”

[Go to Chapter 2 – Click on Revenues and Expenditures](#)

[Download Tables 156, 157, 162, and 166.](#)

GA DOE Data: <http://www.doe.k12.ga.us>.

Under “Office and Program Areas” scroll down to the very bottom and click on “Information Technology.” Now, on the left side, click on Report Cards. Download the State DOE report card for 2000-2001 and 2001-2002. (The 2003 OSA report card does NOT include fiscal information; that information is not yet available.)

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3 & 4

**June 18 & 19**

Discussion will focus on why education is important (human capital); continue the discussion of property taxes; introduce basic concepts of school finance equity; and introduce various state funding mechanisms.

**Read:**

Langelett, "Human Capital: A Summary of the 20<sup>th</sup> Century Research," 2002

*Equity & Adequacy*, Chapter 1 **and** Chapter 5

Frances Fowler, "Converging Forces: Understanding the Growth of State Authority Over Education," 2000.

5 & 6

**June 25 & 26**

and

Discussion will focus on issues of equity and state funding; school finance litigation; state and school district responses to litigation.

**Read:**

*Equity & Adequacy*, Chapters 2 **and** 3 **and** 4

of

Betty Malen & Donna Muncey, "Creating a New Set of Givens: The Impact State Activism on School Autonomy," 2000.

7 & 8

**July 2 & 3**

Discussion will focus on analysis and comparison of states that have experienced litigation and their responses.

**Student Presentations will be a major component of this discussion.**

9 & 10      **July 9 & 10**

of              Discussion will focus on adequacy from a legal and funding perspective. Examination of Georgia's funding from an *adequacy* stance will begin.

**Read:**

*Equity & Adequacy*, Chapters 6 **and 7 and 8**

James Guthrie, "Twenty-First Century Education Finance: Equity, Adequacy, and the Emerging Challenge of Linking Resources to Performance," 2004.

11 & 12      **July 16 & 17** - Web-based activity and time to work on adequacy study and final paper

13 & 14      **July 23 & 24**

Discussion will focus on interventions intended to provide compensatory education for "at-risk" students. Federal funding, including NCLB, will be discussed. Also included in these discussions will be the growing reliance on alternative funding for schools.

**Read:**

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

Federal              Kenneth Wong & Anna Nicotera, "Toward Stronger Accountability in  
Child Left Behind,"              Title I: Fiscal Implications in the Implementation of No  
2004.

James McPartland & Will Jordan, "Older Students Also Need Major Federal Compensatory Education Resources," 1999.

Stephen Chaikind, "Expanding Value Added in Serving Children with Disabilities," 2001

Michael Addonizio, "New Revenues for Public Schools: Blurring the Line Between Public and Private Finance," 2001.

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15 & 16      **July 30 & 31**

### **FINAL CLASSES**

We will have multiple presentations. Groups will present their findings on the adequacy of Georgia Funding.

Individuals will present their findings on school finance topics. This should serve as a good way to summarize and bring together all of the issues and topics we will have covered this semester.