Instructor Information:

Dr. Curtis “Todd” Bowden

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Required Textbook:

Brimley, Verstegen, & Garfield (2012). Financing Education: In a Climate of Change (11th ed.). Pearson
ISBN-10: 0137071361

Program Portfolio:

After successfully completing all courses for this program students are required to submit a Program Portfolio during the semester the student applies for graduation. Portfolio Guidelines: http://www.coedu.usf.edu/main/departments/edlead/documents/MEDPortfolioGuidelines_000.pdf

Course Prerequisite:

Graduate standing, EDA 6061 Principles of Educational Administration

Course Description:

The course examines current economic theories, budgeting processes, sources of revenues, expenditure of funds, and trends in the fiscal structure and operations of public education from a federal, state and local perspective, with emphasis on the Florida Education Finance Program (FEFP). Throughout the course students will be examining the social-economic-political context in which public finance decisions are evolved and their relationship to current educational issues thought the nation, with specific emphasis on Florida.
Guidelines Used in Developing Course Objectives:

- Educational Leadership Constituent Council (ELCC) Standards
- Florida Department of Education (FDOE) Principal Standards
- Florida Educational Leadership Exam (FELE) Standards
- Interstate Leader Licensure Consortium Standards (ISLLC)
- National Council Accreditation of Teacher Education (NCATE)
- University of South Florida Department of Educational Leadership & Policy Studies

Description of Program Domains (See Appendix 1)

Course Objectives (See Appendix 2 for NCATE/ELCC standards):

1) Identify the contributions of education to the economy and the community.  
   (ELCC: Context 6.1.e.)

2) Examine the philosophical and historical contexts of public school funding.  
   (ELCC: Context 6.1.e., 6.3.b.; NCATE 8.1; FELE Leadership F, Organizational Management E,  
   Communications D, School Finance: C, E; FPC 1, 5, 6, 7, 14, 18)

3) Study varying approaches among the states to funding public schools, while analyzing whether or not the  
   plan provides for adequacy and equity. (ELCC: Context 6.1.e., 6.3.b.; NCATE 8.1; FELE School Finance: A,  
   C, E; School Law C; FPC 5, 6, 7, 14, 15, 18; ISLLC 3, 5, 6)

4) Study separate major revenue sources and demonstrate understanding of their equitable and efficient  
   use to support public education. (ELCC: Manage Resources 3.3.a, 4.3.c.; NCATE 8; FELE School Finance A,  
   E, School Law C; FPC 5, 6, 7, 11, 14, 15, 18)

5) Understand and demonstrate ability to apply the essential elements of the Florida Education Funding  
   Program (FEFP) in order to optimize learning for all students. (ELCC: Manage the Organization, 3.1.a.;  
   NCATE 8.2, 8.3, 8.4; FELE School Finance: A, B, C, E, Technology E, F; FPC 1, 5, 6, 7, 11, 14, 15, 18)

6) Demonstrate an understanding of the purpose of budgeting; detect the factors that cause change in the  
   district’s and school’s budget; and understand and apply the concepts and current methods of budgeting.  
   (ELCC: Manage the Organization, 3.1.b., Manage Resources 3.3.a., 3.3.c.)

7) Understand and explain a range of financial activities in which principals participate, including budget  
   planning, budget management, purchasing, auditing, support services, and fund raising within the political  
   contexts and reality of public school funding. (ELCC: Manage the Organization 3.1.b., 3.1.c., 3.3.b.)

8) Gain an understanding of the role of the courts in influencing school funding. (NCATE 8.2); FELE School  
   Finance C, School Law A, B, C, D; FPC 1, 5, 6, 7, 14, 18)

9) Compare and apply equity concepts and ethical practice.  
   (ELCC: Ethical Leadership 5.1.a, 5.3.a.)

Diversity:

Through the use of readings, class discussions, case studies, problem-based learning, written assignments and field  
experiences students will have opportunities to develop their own understanding and skills in becoming more  
effective leaders in diverse learning organizations.

Technology:

Education leaders use and promote technology and information systems to monitor, manage, and enrich the  
learning environment while also increasing productivity and assessment systems. To this end, Educational  
Leadership students will incorporate technology as a tool to facilitate their study of course content and to facilitate  
completion of course requirements. Applications may include the use of Blackboard Learning System; word-
processing; communication; presentations; along with accessing library, government, and education related resources over the web.

**Methods of Instruction:**

Students will be asked to participate in small and large group discussions that focus of self-reflection and integration of new material. Other modes of instruction may include lecture, media presentations, problem analysis, student presentations, written assignments and field experiences.

**Grading:**

As practicing educators, students are expected to participate fully in class exercises and will be evaluated, in part, on the degree and thoughtfulness of their participation. Evaluation is based on the attainment of the course outcomes as demonstrated by the completion of all course requirements. These course outcomes cannot be successfully attained without active and thoughtful participation on your part. *Publication Manual of the American Psychological Association* (APA) (2001) (5th ed.) is the style adopted by the Department of Educational Leadership and Policy Studies and the College of Education. Apply it appropriately and consistently throughout written work.

**Grading Scale (based on percentage of total points earned)**

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Grade</th>
</tr>
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<tbody>
<tr>
<td>90 – 100%</td>
<td>A</td>
</tr>
<tr>
<td>80 - 89%</td>
<td>B</td>
</tr>
<tr>
<td>70 - 79%</td>
<td>C</td>
</tr>
<tr>
<td>Below 70%</td>
<td>F</td>
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**Assessment of Student Outcomes:**

**Attendance & Participation**

Each student is expected to be an active participant in each class demonstrating their understanding of the ideas or content being considered (10 points per week x 9 weeks).

**Demonstrated Mastery of the FEFP**

Each student is expected to demonstrate mastery of the Florida Education Finance Program.

**Definitions and Reflection**

Each student is expected to complete the assigned readings on a weekly basis. A reflection for each chapter and definitions of relevant terms will be submitted for each chapter (10 points per chapter x 15 chapters).

**Presentation of a State Funding Formula**

Each student will select a state funding system to compare and contrast with the state of Florida’s systems for funding public schools. The student work will culminate with a class presentation.

**Presentation of a School Budget and Interview with a School Leader**

The formation, implementation, and monitoring of an individual school budget is an essential skill for all school administrators.
**Student Debate**  

Each week, a topic will be debated in class. Students should come to class prepared to advocate for both sides of the debate topic. Students are strongly encouraged to locate and cite outside supporting materials (10 points per debate x 5 debates).

**Final Examination**  

Each student must demonstrate conceptual knowledge and personal competence on a written examination.

**Course Calendar:**

**Week 1 (January 7, 2014) --- Class will NOT meet face-to-face**

- Instructor Introduction
- Student Introductions
- Course Overview
- Introduction to the FEFP

**Week 2 (January 14, 2014)**

- Course Overview
- Overview of Chapter Submission Expectations
- Overview of State Funding Formula Project
- Overview of Weekly Debate Format
- Introduction to the FEFP

**Week 3 (January 21, 2014)**

- Chapter 1: The Economics of Education
- Student Debate #1: The Compensation of Teachers – Steps and Salary Lanes versus Teacher Performance Pay
- Chapter 2: The Need for Adequate Funds

**Week 4 (January 28, 2014)**

- Chapter 3: Financing Education Equitably
- Student Presentations of a State Funding Formula
- Chapter 4: Patterns for School Finance Systems
- Student Debate #2: The Goal of School Finance - Adequacy versus Equity

**Week 5 (February 4, 2014)**

- Chapter 5: Sources of Revenue
- Student Presentations of a State Funding Formula
- Chapter 12: Administering the District and School Budget
- Student Debate #3: The State of Florida should institute an Income Tax
Week 6 (February 11, 2014)

Chapter 6: Eroding Local Control
Chapter 7: Education – A State Function
Student Presentations of a State Funding Formula
Chapter 8: Federal Interest in Education
Student Debate #4: The U.S. Department of Education should/should not be Abolished

Week 7 (February 18, 2014)

Chapter 9: The Influence and Climate of the Courts
Special Cases from Florida
Student Presentations of a School Budget and Interview with a School Leader
Chapter 10: Public Funds and Nonpublic Schools
Student Debate #5: Do Charter Schools have a place in Public Education?

Week 8 (February 25, 2014)

Chapter 11: Financing School Facilities
Student Presentations of a School Budget and Interview with a School Leader
Chapter 13: Accounting and Auditing
School Accounting 101

Week 9 (March 4, 2014)

Chapter 14: Business Aspects of the School Community
Student Presentation of a School Budget and Interview with a School Leader
Chapter 16: The Road Ahead in School Finance
Overview of Final Examination
Course Evaluation

SPRING BREAK --- NO CLASS ON MARCH 11th

Week 10 (March 18, 2013)

Final Examination
Course Bibliography:


USF Policies

**ATTENDANCE:** Graduate students are expected to attend all scheduled classes and participate in all online activities. When a need arises to be absent, the problem should be discussed with the instructor. Absenteeism and excessive tardiness will impact overall course grade.

**ADA Statement:** Students with disabilities are responsible for registering with the Office of Student Disabilities Services in order to receive special accommodations and services. Please notify the instructor during the first week of classes if a reasonable accommodation for a disability is needed for this course. A letter from the USF Disability Services Office must accompany this request.

**USF Policy on Religious Observances:** Students who anticipate the necessity of being absent from class due to the observation of a major religious observance must provide notice of the date(s) to the instructor, in writing, by the second class meeting.

**Web Portal Information:** Every newly enrolled USF student receives an official USF e-mail account that ends with "mail.acomp.usf.edu." Every official USF correspondence to students will be sent to that account. Students should go to the Academic Computing website ([http://www.acomp.usf.edu](http://www.acomp.usf.edu)) and select the link "Activating a Student E-mail Account" for detailed information. Information about the USF Web Portal can be found at: [http://www.acomp.usf.edu/portal.html](http://www.acomp.usf.edu/portal.html).

**Academic Dishonesty:** Information can be found in the online Graduate Catalog: [http://www.ugs.usf.edu/catalogs/0304/adadap.htm#plagiarism](http://www.ugs.usf.edu/catalogs/0304/adadap.htm#plagiarism). All assignments represent the individual work of student unless designated specifically by the instructor to be collaborative in nature. Punishment for academic dishonesty will depend on the seriousness of the offense and may include receipt of an “F” with a numerical value of zero on the item submitted, and the “F” shall be used to determine the final course grade. It is the option of the instructor to assign the student a grade of F or FF (the latter indicating dishonesty) in the course.

**Detection of Plagiarism:** [http://www.cte.usf.edu/plagiarism/plag.html](http://www.cte.usf.edu/plagiarism/plag.html)

The University of South Florida has an account with an automated plagiarism detection service which allows instructors to submit student assignments to be checked for plagiarism. I reserve the right to 1) request that assignments be submitted to me as electronic files and 2) electronically submit assignments to SafeAssignment or Turnitin.com. Assignments are compared automatically with a huge database of journal articles, web articles, and previously submitted papers. The instructor receives a report showing exactly how a student’s paper was plagiarized. For more information, go to [www.turnitin.com](http://www.turnitin.com) and [http://www.ugs.usf.edu/catalogs/0304/adadap.htm#plagiarism](http://www.ugs.usf.edu/catalogs/0304/adadap.htm#plagiarism).
<table>
<thead>
<tr>
<th>Standards</th>
<th>Standards and Domains to be Addressed</th>
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<tr>
<td><strong>NCATE/ELCC Standards</strong></td>
<td><strong>ORGANIZATIONAL MANAGEMENT</strong></td>
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| 3.1 Manage the Organization | 3.1.a. Demonstrate ability to optimize learning environment for all students by applying appropriate models & principles of organizational development & management, including research & data driven decision-making with attention to indicators of equity, effectiveness, & efficiency.  
3.1.b. Develop plans of action for focusing on effective organization & management of fiscal, human, & material resources, giving priority to student learning, safety, curriculum, & instruction.  
3.1.c. Demonstrate ability to manage time effectively & deploy financial & human resources in ways that promote student achievement. |
| 3.3 Manage Resources | 3.3.a. Use problem-solving skills & knowledge of strategic, long-range, & operational planning (including applications of technology) in effective, legal, & equitable use of fiscal, human, & material resource allocation & alignment that focuses on teaching & learning.  
3.3.b. Seek new resources to facilitate learning.  
3.3.c. Apply & assess current technologies for school management, business procedures, & scheduling. |
| **COLLABORATIVE LEADERSHIP** | **Standard 4.3. Mobilize Community Resources** |
| 4.3.c. | Demonstrate understanding of ways to use public resources & funds appropriately & effectively to encourage communities to provide new resources to address emerging student problems. |
| **ETHICAL LEADERSHIP** | **Standard 5.1 Acts with Integrity** |
| 5.1.a. | Demonstrate a respect for rights of others with regard to confidentiality and dignity, and engage in honest interactions. |
| **Standard 5.3 Acts Ethically** | **5.3.a. Make and explain decisions based on ethical and legal principles.** |
| **CONTEXT** | **Standard 6.1 Understanding the Larger Context** |
| 6.1.e. | Demonstrates ability to describe economic factors shaping a local community & effects economic factors have on local schools. |
| **Standard 6.3 Influence the Larger Context** | **6.3.b. Apply understanding of larger political, social, economic, legal, & cultural context to develop activities & policies that benefit students & their families.** |
| **Fieldwork** | **Fieldwork is accomplished through the course projects which require district and school site access to data and personnel for the development and practice of leadership skills. Projects within the course are used to assess student performance with respect to the course objectives and are verified in the Program Portfolio. Projects: Annotated Budget, Financial Activity Internal Controls** |
# Appendix 2

## University of South Florida

### Educational Leadership & Policy Studies

#### Description of Program Domains

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<thead>
<tr>
<th>Program Domain</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Visionary &amp; Strategic Leadership</strong></td>
<td>Education leaders demonstrate the ability to integrate theory, research, and practice to envision a desired future and facilitate setting strategic directions for change needed to develop learning- and learner-centered schools. Education leaders are grounded in a personal philosophy of education and education leadership. They are also the lead learners in the school community. They are change agents who use theory, research, and theoretically grounded practices to transform schools into collaborative, responsible learning communities.</td>
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<tr>
<td><strong>Leadership for Student Performance</strong></td>
<td>Education leaders promote a positive school culture that develops context-appropriate strategies to improve school programs and enhance student learning and performance. Education leaders assist school personnel to identify, understand, and use research-based and theoretically grounded learning strategies, curriculum, and instructional and assessment practices. Education leaders understand that well-planned, contextually appropriate professional development is essential for teacher reflective practice, professional growth, and enhanced student learning and performance. Education leaders develop a school culture that understands and is comfortable using data to assess progress toward learning goals and effectiveness of curriculum, instruction, and professional development programs.</td>
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<tr>
<td><strong>Organizational &amp; Resource Management</strong></td>
<td>Education leaders manage the school organization to optimize the learning environment for students and staff. They develop plans for effective fiscal, human, and resource management to promote student learning and performance. They involve staff in setting priorities based on needs assessment, research-based data, effective problem solving, consensus building, and conflict resolution to align resources with organizational vision and performance goals.</td>
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<tr>
<td><strong>Collaborative Leadership</strong></td>
<td>Education leaders know how to work collaboratively in leading schools. They know how to engage others in reflective practice, effective communication, and reaching consensual outcomes. Education leaders support and facilitate collaboration at all levels of the school community by providing logistical support, developing a strategic process, developing productive group dynamics, mobilizing community resources, and increasing the school community’s ability to use collaboration in change processes.</td>
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<tr>
<td><strong>Ethical Leadership &amp; Social Justice</strong></td>
<td>Education leaders work in school communities as advocates for learning-centered, student-focused schools as well as advocates for all students. They are self-aware and authentic. They develop well-reasoned beliefs based on integrity, equal educational opportunities for all learners, and respect for the rights of others. Education leaders engage in ethical practice, not only modeling professional conduct but also enabling a positive, egalitarian learning environment.</td>
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<tr>
<td><strong>Legal, Policy, Political &amp; Socio-cultural Contexts of Leadership</strong></td>
<td>Education leaders embrace diversity and know how to identify and address implications of diversity and exceptionality for teaching and learning, and for policy and practice. Education leaders make decisions based on moral, ethical, and legal principles. They advocate for equity and help school communities surface and address diversity “blind spots.”</td>
</tr>
<tr>
<td><strong>Technology</strong></td>
<td>Education leaders use and promote technology and information systems to monitor, manage, and enrich the learning environment. They know how to assess and apply current technology for time, task, and systems management; effective and timely communication; information access, management, and presentation; curriculum enrichment; and diversification of instructional strategies. Education leaders act as informed consumers of technology, selecting technology appropriate to organizational vision and performance goals, evaluating technology effectiveness, and addressing issues of technology access and equity.</td>
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