



Course Syllabus: 5733 Public School Financial Management

Gordon T. & Ellen West College of Education
EDLE-5733-X30 Public School Financial Management
Summer I 2026: June 1 – July 3, 2026

Contact Information

Instructor: Daniel L. Frazier, Ed.D.
Office: Bridwell Hall, Room 222
Office Hours: I will not be maintaining office hours this summer.
Office Telephone: I will not be in the office this summer.
Cellular Telephone: (515) 825-7577
eMail: daniel.frazier@msutexas.edu

Instructor Communication

The best way to contact me is through email. I usually respond quickly. You can expect a response within 24 hours; however, it could be a little longer on weekends or holidays. I provide my personal cellular telephone number, but I ask it not be used for calls or texts unless absolutely necessary as I cannot assure anyone I am available at any given time during the summer hours.

Course Description

An exploration of principles of P-12 public school finance, budget development, building-level fiscal management, facility planning and management, and build-level student services management. Course may not be used for students seeking principal certification.

Required Textbook

Sorenson, R. and Goldsmith, L. (2024). *The principal's guide to school budgeting* Fourth Edition (Revised and Updated Edition). Thousand Oaks, CA: Corwin.
eBook ISBN: 9781071915974. Paperback ISBN: 9781071915851.

Course Objectives/Learning Outcomes/Course Competencies

Specific learning objectives for the course derive from the standards outlined in Appendix A. Satisfactory completion of the course will document that students have demonstrated the ability to satisfy those standards. See Appendix A: TEA Principal Standards and Building Level Competencies.

Class Overview

This course introduces students earning their Master's Degrees in Education to essential public school finance and business management principles. Students both on the principal and non-principal track must have a functional understanding of school business management and financial structures to manage programs and/or to lead buildings.

This course will include academic theory, state, and district-level best practices as they relate to practical site-level business and financial management issues. Critical thinking, problem solving skills, and sound decision-making skills will be evidenced through writing and audiovisual presentations. Technology skills and understanding of the importance of technology to managing public schools is essential.

This is a completely online/virtual class. No zoom or in-person sessions will be required, but the instructor will expect students to view supplemental instructional videos throughout the course. Furthermore, discussion board participation and viewing of classmate presentations are also critical. The social aspect of learning is a powerful tool; we will balance it as much as possible within the confines of a virtual format.

Major Goals of the Course

The major goals of this course are to

- Emphasize the priority of ethics in relation to the handling of finances;
- Develop an understanding of the sources of public school funding and the ethical and political issues related to how schools are funded;
- Learn money management methods and techniques employed by modern school districts;
- Examine methods for working as a team with faculty and staff in budget development;
- Consider the internal politics associated with financial allocations;
- Analyze real-world scenarios as examples of challenges faced in the workplace; and
- Gain skills in how to allocate and budget for a public organization.

These goals will be achieved through readings, writing, reflection, and application of new knowledge and skills.

Grading/Assessment

Table 1: Points allocated to each assignment.

<u>Assignments</u>	<u>Points</u>	<u>Calculated</u>
Participation: Writing and Responding to Discussion Posts	60	(12 posts X 5 pts)
Case Studies	90	(9 cases X 10 pts)
Ethical Issues Discussions	120	(12 issues X 10 pts)
P-Card Activity	40	Due June 21
Budgeting Codes Activity - Resource C (240)	40	Due June 25
Budget Development Project	50	Due June 28
TEA Assessment #4: Finance Project	100	Due July 3, 2026
TOTAL POINTS	500	

Table 2: Total points for final grade.

<u>Grade</u>	<u>Points</u>
A	450 to 500
B	400 to 449
C	350 to 399
D	300 to 349
F	Less than 300

Assignments, Quizzes, and Examinations

There will be no quizzes nor examinations in this class. Instead, the assignments in this course have heavier weighting. This course is intending to use purposeful work-based assignments as authentic assessments. As such, weekly assignments will have a higher level of scrutiny when graded and be held to a higher standard of performance.

Projects Required

There will be no final examination in this class. The major project, the NELP/TEA Assessment #4, Finance Project, will take the place and carry the weight of a final examination. Assessment #4 is designed for principal candidates enrolled in EDLE 5643 School Business Management. They are asked to create a presentation to a school board on the basis of money awarded to the principal's school.

Students enrolled in 5733 Public School Financial Management are asked to creatively adapt this scenario to their individual career fields. These projects will include a written report to a boss, council, or board and a slide show. However, it does *NOT* include a recorded video.

Extra Credit

This is a masters-level class so there are no extra credit assignments.

Late Work and Make Up Work

This is a masters-level class so assignments should be submitted on time.

Attendance/Participation

Regular online participation is required. Please attend to discussions in a timely manner. Professional dialogue opportunities are part of this class; participation will be considered part of the grade.

Quality Requirements

"Turning in" all assignments is not enough to ensure an "A" in the course. Quality of work turned in on time is the most important criterion for receiving an "A." Quality graduate work includes fully engaging in the online discussions.

Expectations for Written Work

- Correct grammar, punctuation, and spelling are expected on all written assignments (although web discussions are not held to the high standard of a research project or other written assignment).
- Written assignments should be done in Microsoft Word and turned in as an attachment in Dropbox on D2L.
- Discussions should be completed within the D2L discussion space and *NOT* uploaded as an attachment.
- Due dates should be honored in order to receive the highest grade.
- When referring to the ideas of others, works should be cited using the APA format.

Online Posts and Mutual Respect

Remember that there are other human beings reading your postings, so treat everyone with respect. Don't post anything you wouldn't be willing to communicate face to face. Distance conveys a degree of anonymity. It is for this reason that we must be cognizant of our postings online. You are provided with Netiquette guidelines and Rules for Discussion Posts. Please observe them.

Adhering to Professional Ethics

When using professional sources in your writing, please cite sources you have used or ideas you have adapted when completing assignments. Use of copyrighted materials must adhere to legal and ethical guidelines. If part of an assignment is submitted for credit in more than one course, both professors

must pre-approve this dual credit and the dual use should be referenced clearly on both assignments.

Academic Misconduct Policy & Procedures

Academic Dishonesty: Cheating, collusion, and plagiarism (the act of using source material of other persons, either published or unpublished, without following the accepted techniques of crediting, or the submission for credit of work not the individual's to whom credit is given). Additional guidelines on procedures in these matters may be found in the Office of Student Conduct. [Office of Student Conduct](#)

Artificial Intelligence

Advances in Artificial Intelligence (AI) have now provided generative and creative applications such as Chat GPT, Google Gemini, Doubao, Quark, Grok, and others. Certainly, these tools can be quite useful in the learning process; however, the content they generate do not represent the effort and learning of the student. Submitting AI generated work in place of the original and genuine work of the student will be considered a form of academic misconduct.

Important Dates

- Last day for term schedule changes: Check date on [Academic Calendar](#).
- Deadline to file for graduation: Check date on [Academic Calendar](#).
- Last Day to drop with a grade of "W:" Check date on [Academic Calendar](#).
- Refer to: [Drops, Withdrawals & Void](#)

Desire-to-Learn (D2L)

Extensive use of the MSU D2L program is a part of this course. Each student is expected to be familiar with this program as it provides a primary source of communication regarding assignments, examination materials, and general course information. You can log into [D2L](#) through the MSU Homepage. If you experience difficulties, please contact the technicians listed for the program or contact your instructor.

Online Computer Requirements

Taking an online class requires you to have access to a computer (with Internet access) to complete and upload your assignments. It is your responsibility to have (or have access to) a working computer in this class. *Assignments and tests are due by the due date, and personal computer technical difficulties will not be considered reason for the instructor to allow students extra time to submit assignments, tests, or discussion postings. Computers are available on campus in various areas of the buildings as well as the Academic Success Center. *Your

computer being down is not an excuse for missing a deadline!! There are many places to access your class! Our online classes can be accessed from any computer in the world which is connected to the internet. Contact your instructor immediately upon having computer trouble. If you have technical difficulties in the course, there is also a student helpdesk available to you. The college cannot work directly on student computers due to both liability and resource limitations; however, they are able to help you get connected to our online services. For help, log into [D2L](#).

Change of Schedule

A student dropping a course (but not withdrawing from the University) within the first 12 class days of a regular semester or the first four class days of a summer semester is eligible for a 100% refund of applicable tuition and fees. Dates are published in the Schedule of Classes each semester.

Refund and Repayment Policy

A student who withdraws or is administratively withdrawn from Midwestern State University (MSU) may be eligible to receive a refund for all or a portion of the tuition, fees and room/board charges that were paid to MSU for the semester. HOWEVER, if the student received financial aid (federal/state/institutional grants, loans and/or scholarships), all or a portion of the refund may be returned to the financial aid programs. As described below, two formulas (federal and state) exist in determining the amount of the refund. (Examples of each refund calculation will be made available upon request).

Services for Students with Disabilities

In accordance with Section 504 of the Federal Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, Midwestern State University endeavors to make reasonable accommodations to ensure equal opportunity for qualified persons with disabilities to participate in all educational, social, and recreational programs and activities. After notification of acceptance, students requiring accommodations should make application for such assistance through Disability Support Services, located in the Student Wellness Center, (940) 397-4140. Current documentation of a disability will be required in order to provide appropriate services, and each request will be individually reviewed. For more details, please go to [Disability Support Services](#).

Student Handbook

Refer to: [Student Handbook](#)

Moffett Library

Moffett Library provides resources and services to support student's studies and assignments, including books, peer-reviewed journals, databases, and

multimedia materials accessible both on campus and remotely. The library offers media equipment checkout, reservable study rooms, and research assistance from librarians to help students effectively find, evaluate, and use information. Get started on this [Moffett Library webpage](#) to explore these resources and learn how to best utilize the library.

College Policies

Obligation to Report Sex Discrimination under State and Federal Law

Midwestern State University is committed to providing and strengthening an educational, working, and living environment where students, faculty, staff, and visitors are free from sex discrimination of any kind. State and federal law require University employees to report sex discrimination and sexual misconduct to the University's Office of Title IX. As a faculty member, I am required to report to the Title IX Coordinator any allegations, personally observed behavior, or other direct or indirect knowledge of conduct that reasonably may constitute sex discrimination or sexual misconduct, which includes sexual assault, sexual harassment, dating violence, or stalking, involving a student or employee. After a report is made, the office of Title IX will reach out to the affected student or employee in an effort to connect such person(s) with resources and options in addressing the allegations made in the report. You are also encouraged to report any incidents to the office of Title IX. You may do so by contacting:

Laura Hetrick
Title IX Coordinator
Sunwatcher Village Clubhouse
940-397-4213
laura.hetrick@msutexas.edu

You may also file an online report 24/7 at
https://cm.maxient.com/reportingform.php?MSUTexas&layout_id=6

Should you wish to visit with someone about your experience in confidence, you may contact the MSU Counseling Center at 940-397-4618. For more information on the University's policy on Title IX or sexual misconduct, please visit <https://msutexas.edu/titleix/>

Smoking/Tobacco Policy

College policy strictly prohibits the use of tobacco products in any building owned or operated by WATC. Adult students may smoke only in the outside designated-smoking areas at each location.

Alcohol and Drug Policy

To comply with the Drug Free Schools and Communities Act of 1989 and subsequent amendments, students and employees of Midwestern State are informed that strictly enforced policies are in place which prohibits the unlawful possession, use or distribution of any illicit drugs, including alcohol, on university property or as part of any university-sponsored activity. Students and employees are also subject to all applicable legal sanctions under local, state and federal law for any offenses involving illicit drugs on University property or at University-sponsored activities.

Campus Carry Rules/Policies

Refer to: [Campus Carry Rules and Policies](#)

Campus Carry

Effective August 1, 2016, the Campus Carry law (Senate Bill 11) allows those licensed individuals to carry a concealed handgun in buildings on public university campuses, except in locations the University establishes has prohibited. The new Constitutional Carry law does not change this process. Concealed carry still requires a License to Carry permit, and openly carrying handguns is not allowed on college campuses. For more information, visit [Campus Carry](#).

Active Shooter

The safety and security of our campus is the responsibility of everyone in our community. Each of us has an obligation to be prepared to appropriately respond to threats to our campus, such as an active aggressor. Please review the information provided by MSU Police Department regarding the options and strategies we can all use to stay safe during difficult situations. For more information, visit [MSUReady – Active Shooter](#). Students are encouraged to watch the video entitled “*Run. Hide. Fight.*” which may be electronically accessed via the University police department’s webpage: [“Run. Hide. Fight.”](#)

Grade Appeal Process

Update as needed. Students who wish to appeal a grade should consult the Midwestern State University [MSU Catalog](#)

***Notice:** Changes in the course syllabus, procedure, assignments, and schedule may be made at the discretion of the instructor.

Course Schedule:

<u>Module</u>	<u>Activities/Assignments/Exams</u>	<u>Due Date</u>
Module 1 6/1 to 6/2/26	Sorenson & Goldsmith–Intro and Chapter 1, pp. 1-26. Emphasis on PSEL 2.	June 2
Module 2 6/3 to 6/4	Sorenson & Goldsmith–Read Chapter 2. Case Study: Scarlet C. Doyle MS.	June 4
Module 3 6/5 to 6/7	Chapter 3, First Half, pp. 47-62, through the eight components. Belle Plain MS.	June 7
Module 4 6/8 to 6/9	Complete Chapter 3, Second Half. Case Study: Pecan Bay, Part II.	June 9
Module 5 6/10 to 6/11	Sorenson & Goldsmith–Chapter 4. Case Study: Fiscal Issues, New Principal.	June 11
Module 6 6/12 to 6/14	Sorenson & Goldsmith–Chapter 5. Case Study: Upturns and Downfalls.	June 14
Module 7 6/15 to 6/16	Sorenson & Goldsmith–Chapter 6. Crowd Sourcing. Love that Principal!	June 16
Module 8 6/17 to 6/18	Chapter 7, the First Half, pp. 149-166. P-Cards. Budget Project Assigned.	June 18
Module 9 6/19 to 6/21	Complete Chapter 7 (Second Half). A Tangled Web. P-Card Project Due.	June 21
Module 10 6/22 to 6/23	Sorenson & Goldsmith–Chapter 8. Case Study: Shifting Paradigms.	June 23
Module 11 6/24 to 6/25	Sorenson & Goldsmith–Chapter 9. Kay Carter MS. Coding Activity Due.	June 25
Module 12 6/26 to 6/28	Finish Sorenson & Goldsmith. Restricted Funds. Budget Project Due June 28.	June 28
Module 13 6/29 to 6/30	Time reserved for work on the major Finance Project.	June 30
Module 14 7/1 to 7/3	Assessment #4: Finance Project Due July 3	July 3

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Appendix A:

Texas Building Principal Standards

The objectives of this course are aligned with the Principal Standards:

Domain I - School Culture (School and Community Leadership)

Competency 001

D. Aligns financial, human, and material resources to support implementation of a campus vision and mission

Domain III - Human Capital (Human Resource Management)

Competency 006

A. Invests and manages time to prioritize the development, support, and supervision of the staff to maximize student outcomes

Domain IV - Executive Leadership (Communication and Organizational Management)

Competency 008

A. Demonstrates awareness of social and economic issues that exist within the school and community that affects campus operations and student learning

C. Frames, analyzes, and creatively resolves campus problems using effective problem-solving techniques to make timely, high-quality decisions

Domain V - Strategic Operations (Alignment and Resource Allocation)

Competency 009

A. Assesses the current needs of the campus, analyzing a wide set of evidence to determine campus objectives, and sets measurable school goals, targets, and strategies that form the school's strategic plans

C. Allocates resources effectively (e.g., staff time, master schedule, dollars, and tools), aligning them with school objectives and goals, and works to access additional resources as needed to support learning

Competency 010

A. Implements strategies that enable the physical plant, equipment, and support systems to operate safely, efficiently, and effectively to maintain a conducive learning environment

B. Applies strategies for ensuring the safety of students and personnel and for addressing emergencies and security concerns, including developing and implementing a crisis plan

D. Collaboratively plans and effectively manages the campus budget within state law and district policies to promote sound financial management in relation to accounts, bidding, purchasing, and grants

National Educational Leadership Preparation (NELP) Standards

NELP Building Level Standards:

<https://www.npbea.org/wp-content/uploads/2018/11/NELP-Building-Standards.pdf>