



## **Course Syllabus: EDLE 6153 District Financial Leadership**

Gordon T. & Ellen West College of Education

EDLE-6153-DX1/EDLE-6153-X10

Fall Semester 2023: August 28 - December 15, 2023

### **Contact Information**

Instructor: Daniel L. Frazier, Ed.D.  
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### **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.

### **Syllabus Changes or Updates**

This syllabus is subject to change based on a variety of factors that may impact the hybrid course design.

### **Required Textbooks**

*American Public School Finance 3rd Edition*

by William A. Owings (Author), Leslie S. Kaplan (Author)

ISBN-13: 978-1138499966

### **Course Description**

This course provides an in-depth examination of public-school finances. Some topics to be examined include: reading account ledgers, developing budgets, income paths, and leading bond proposals, among others.

### **Course Objectives/Learning Outcomes/Course Competencies**

Specific learning objectives for the course derive from the standards outlined below. Satisfactory completion of the course will document that students have demonstrated the ability to satisfy the following standards:

## **NELP Standards for District Financial Leadership**

Component 1.2 Program completers understand and demonstrate the capacity to lead district strategic planning and continuous improvement processes that engage diverse stakeholders in data collection, diagnosis, design, implementation, and evaluation.

Component 2.1 Program completers understand and demonstrate the capacity to reflect on, communicate about, and cultivate professional dispositions and norms (i.e., equity, fairness, integrity, transparency, trust, collaboration, perseverance, reflection, lifelong learning, digital citizenship) and professional district and school cultures.

Component 4.1 Program completers understand and can demonstrate the capacity to evaluate, design, and implement high-quality curricula, the use of technology, and other services and supports for academic and non-academic student programs.

Component 6.1 Program completers understand and demonstrate the capacity to develop, communicate, implement, and evaluate data-informed and equitable management, communication, technology, governance, and operation systems at the district level to support schools in realizing the district's mission and vision.

Component 6.2 Program completers understand and demonstrate the capacity to develop, communicate, implement, and evaluate a data-based district resourcing plan and support schools in developing their school-level resourcing plans.

Component 6.3 Program completers understand and demonstrate the capacity to develop, implement, and evaluate coordinated, data-informed systems for hiring, retaining, supervising, and developing school and district staff in order to support the district's collective instructional and leadership capacity.

## **Texas Superintendent Certification Domains and Competencies District Financial Leadership Texas Competencies**

Domain I: Leadership of the Educational Community

Competency 001: The superintendent knows how to act with integrity, fairness and in an ethical manner in order to promote the success of all students.

Domain III: Administrative Leadership

Competency 008: The superintendent knows how to apply principles of effective leadership and management in relation to district budgeting, personnel, resource utilization, financial management and technology applications.

Competency 009: The superintendent knows how to apply principles of leadership and management to the district's physical plant and support systems to ensure a safe and effective learning environment.

Competency 010: The superintendent knows how to apply organizational, decision-making and problem-solving skills to comply with federal and state requirements and facilitate positive change in varied contexts.

## **Projects Required**

All class participation, presentations, and written assignments will sequentially prepare students for the key NELP assessment:

- Assessment #11 District Budget Presentation
  - This assessment will begin with December 2 class presentations and will be fully completed as part of your final.

The assessment will be based on the NELP framework (see course attachments) that include students' written and oral presentations. Final artifacts will synthesize leadership principles with best practices in district financial leadership within the NELP assessment standards.

## **Big Questions for Social Justice – MSU Texas EdD Courses**

EDLE 6153 District Financial Leadership

- *What equity issues should be considered in leading bond proposals?*
- *What equity issues should be considered in developing district budgets?*

## **Student Handbook**

Refer to: [Student Handbook-2022-23](#)

## **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 Barb, Google Sparrow, 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.

## **Attendance Policy**

Our projected dates for the Saturday courses in the spring are:

Saturday, September 16, 2023:	1:00-4:00 P.M.
Saturday, October 21, 2023:	1:00-4:00 P.M.
Saturday, December 2, 2023:	1:00-4:00 P.M.

Locations of the Saturday sessions are yet to be determined.

Regular attendance is expected. If a class must be missed, please discuss it with the professor beforehand. If an emergency arises, please either telephone or email the professor, if possible.

One of the cornerstones to the WCOE Ed.D experience is the opportunity to interact with colleagues from across other campuses, districts, and professions. To this end, we hold Saturday classes three times per long semester. Students are expected to maintain a physical and professional engagement in these experiences. However, we do understand some circumstances cannot be avoided. Therefore, we have established the following policy:

- 1 absence = make up required experiences/coursework with colleagues
- 2 absences = final grade will be lowered by one letter and make up required experiences/coursework with colleagues
- 3 absences = Failing

COVID policy – if a student is quarantined due to COVID, that student may Zoom a Saturday class. Under these circumstances a student will be required to provide documentation of quarantine requirements from his/her public health district or health care provider.

### **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."

### **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.

## Grading/Assessment

Table 1: Points allocated to each assignment.

Assignments	Points
Weekly Participation (15 weeks X 10 pts)	150
Saturday Participation (3 X 10 pts)	30
In-class District Budget Sharing	10
Quizzes (2 quizzes X 20 pts)	40
Business Official Interview Presentations	20
Final District Budget Presentation	50
Final Written Budget Project- Assessment #9	100
Total Points	400

Table 2: Total points for final grade.

Grade	Points
A	360
B	320 to 359
C	280 to 319
D	240 to 279
F	Less than 240

### 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.

### Important Dates

Last day for term schedule changes: August 31, 2023. Check date on [Academic Calendar](#).

Deadline to file for graduation: September 25, 2023. Check date on [Academic Calendar](#).

Last Day to drop with a grade of "W:" October 30, 2023. Check date on [Academic Calendar](#).

Refer to: [Drops, Withdrawals & Void](#)

### 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 Clark Student Center, Room 168, (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](#).

## **College Policies**

### **Campus Carry Rules/Policies**

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

### **Smoking/Tobacco Policy**

College policy strictly prohibits the use of tobacco products in any building owned or operated by MSU TEXAS. 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**

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 as 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 [Safety / Emergency Procedures](#). 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.](#)"

### **Notice**

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

## Course Schedule

<u>Week or Module</u>	<u>Activities/Assignments/Exams</u>	<u>Due Date</u>
Week 1 8/28 to 9/3	Read the syllabus and explore the course content. Post your self-introduction.	September 3, 2023
Week 2 9/4 to 9/10	Misconceptions on School Finance Read Owings & Kaplan Chapter 1.	September 10, 2023
Week 3 9/11 to 9/17	History of SF in US Read Owings & Kaplan Chapter 2.	September 17, 2023
<i>Saturday Class</i> 9/16/2023	<i>Class meets 1:00 to 4:00 (apprx.).</i> District Budget Sharing.	
Week 4 9/18 to 9/24	Legal Framework Read Owings & Kaplan Chapter 3.	September 24, 2023
Week 5 9/25 to 10/1	Education as an Investment Read Owings & Kaplan Chapter 4.	October 1, 2023
Week 6 10/2 to 10/8	Taxation Read Owings & Kaplan Chapter 5.	October 8, 2023
Week 7 10/9 to 10/15	Fiscal Capacity and Fiscal Effort Read Owings & Kaplan Chapter 6. Midterm Quiz.	October 15, 2023
Week 8 10/16 to 10/22	Equity, Adequacy, and Efficiency Read Owings & Kaplan Chapter 7.	October 22, 2023
<i>Saturday Class</i> 10/21/2023	<i>Class meets 1:00 to 4:00 (apprx.).</i> Present Business Office Interview.	
Week 9 10/23 to 10/29	Structure of SF Systems Read Owings & Kaplan Chapter 8.	October 29, 2023
Week 10 10/30 to 11/5	Student Risk Factors Read Chapter 9 "Risk Factors."	November 5, 2023
Week 11 11/6 to 11/12	Teacher and Admin Demographics Read Chapter 9 "Teacher & Admin" Check for Understanding Quiz.	November 12, 2023
Week 12 11/13 to 11/19	Budgeting Read Owings & Kaplan Chapter 10.	November 19, 2023
Week 13 11/20 to 11/26	Spending & Student Achievement Read Owings & Kaplan Chapter 11.	November 26, 2023
Week 14 11/27 to 12/3	Critical Issues Read Chapter 12 Critical Issues.	December 3, 2023
<i>Saturday Class</i> 12/02/2023	<i>Class meets 1:00 to 4:00 (apprx.).</i> Final Budget Report presented.	
Week 15 12/4 to 12/10	Emerging Issues Read Chapter 12 Emerging Issues. Assessment #11: District Budget Project due.	December 10, 2023



# Texas Examinations of Educator Standards (TExES)

## Domain I—Leadership of the Educational Community

- Competency 001—The superintendent knows how to act with integrity, fairness and in an ethical manner in order to promote the success of all students.
- Competency 002—The superintendent knows how to shape district culture by facilitating the development, articulation, implementation and stewardship of a vision of learning that is shared and supported by the educational community.
- Competency 003—The superintendent knows how to communicate and collaborate with families and community members, respond to diverse community interests and needs and mobilize community resources to ensure educational success for all students.
- Competency 004—The superintendent knows how to respond to and influence the larger political, social, economic, legal and cultural context, including working with the board of trustees, to achieve the district’s educational vision.

## Domain II—Instructional Leadership

- Competency 005—The superintendent knows how to facilitate the planning and implementation of strategic plans that enhance teaching and learning; ensure alignment among curriculum, curriculum resources and assessment; use the current accountability system; and promote the use of varied assessments to measure student performance.
- Competency 006—The superintendent knows how to advocate, promote and sustain an instructional program and a district culture that are conducive to student learning and staff professional growth.
- Competency 007—The superintendent knows how to implement a staff evaluation and development system and select appropriate models for supervision and staff development to improve the performance of all staff members.

## Domain III—Administrative Leadership

- Competency 008—The superintendent knows how to apply principles of effective leadership and management in relation to district budgeting, personnel, resource utilization, financial management and technology applications.
- Competency 009—The superintendent knows how to apply principles of leadership and management to the district’s physical plant and support systems to ensure a safe and effective learning environment.
- Competency 010—The superintendent knows how to apply organizational, decision-making and problem-solving skills to comply with federal and state requirements and facilitate positive change in varied contexts.

## **National Education Leadership Preparation (NELP) Standards**

- Component 1.1 Program completers understand and demonstrate the capacity to collaboratively design, communicate, and evaluate a district mission and vision that reflects a core set of values and priorities that include data use, technology, values, equity, diversity, digital citizenship, and community.
- Component 1.2 Program completers understand and demonstrate the capacity to lead district strategic planning and continuous improvement processes that engage diverse stakeholders in data collection, diagnosis, design, implementation, and evaluation.
- Component 2.1 Program completers understand and demonstrate the capacity to reflect on, communicate about, and cultivate professional dispositions and norms (i.e., equity, fairness, integrity, transparency, trust, collaboration, perseverance, reflection, lifelong learning, digital citizenship) and professional district and school cultures.
- Component 2.2 Program completers understand and demonstrate the capacity to evaluate and advocate for ethical and legal decisions.
- Component 2.3 Program completers understand and demonstrate the capacity to model ethical behavior in their personal conduct and relationships and to cultivate ethical behavior in others.
- Component 3.1 Program completers understand and demonstrate the capacity to evaluate, cultivate, and advocate for a supportive and inclusive district culture.
- Component 3.2 Program completers understand and demonstrate the capacity to evaluate, cultivate, and advocate for equitable access to safe and nurturing schools and the opportunities and resources, including instructional materials, technologies, classrooms, teachers, interventions, and adult relationships, necessary to support the success and well-being of each student.
- Component 3.3 Program completers understand and demonstrate the capacity to evaluate, advocate, and cultivate equitable, inclusive, and culturally responsive instructional and behavior support practices among teachers and staff.
- Component 4.1 Program completers understand and can demonstrate the capacity to evaluate, design, and implement high-quality curricula, the use of technology, and other services and supports for academic and non-academic student programs.
- Component 4.2 Program completers understand and can demonstrate the capacity to collaboratively evaluate, design, and cultivate coherent systems of support, coaching, and professional development for educators, educational professionals, and school and district leaders, including themselves, that promote reflection, digital literacy, distributed leadership, data literacy, equity, improvement, and student success.
- Component 4.3 Program completers understand and can demonstrate the capacity to design, implement, and evaluate a developmentally appropriate, accessible, and culturally responsive system of assessments and data collection, management, and analysis that support instructional improvement, equity, student learning and well-being, and instructional leadership.
- Component 4.4 Program completers understand and demonstrate the capacity to design, implement, and evaluate district-wide use of coherent systems of curriculum,

instruction, assessment, student services, technology, and instructional resources that support the needs of each student in the district.

- Component 5.1 Program completers understand and demonstrate the capacity to represent and support district schools in engaging diverse families in strengthening student learning in and out of school.
- Component 5.2 Program completers understand and demonstrate the capacity to understand, engage, and effectively collaborate and communicate with, through oral, written, and digital means, diverse families, community members, partners, and other constituencies to benefit learners, schools, and the district as a whole.
- Component 5.3 Program completers understand and demonstrate the capacity to communicate through oral, written, and digital means within the larger organizational, community, and political contexts and cultivate relationships with members of the business, civic, and policy community in support of their advocacy for district, school, student, and community needs.
- Component 6.1 Program completers understand and demonstrate the capacity to develop, communicate, implement, and evaluate data-informed and equitable management, communication, technology, governance, and operation systems at the district level to support schools in realizing the district's mission and vision.
- Component 6.2 Program completers understand and demonstrate the capacity to develop, communicate, implement, and evaluate a data-based district resourcing plan and support schools in developing their school-level resourcing plans.
- Component 6.3 Program completers understand and demonstrate the capacity to develop, implement, and evaluate coordinated, data-informed systems for hiring, retaining, supervising, and developing school and district staff in order to support the district's collective instructional and leadership capacity.
- Component 7.1 Program completers understand and demonstrate the capacity to represent the district, advocate for district needs, and cultivate a respectful and responsive relationship with the district's board of education focused on achieving the district's shared mission and vision.
- Component 7.2 Program completers understand and demonstrate the capacity to design, implement, cultivate, and evaluate effective and collaborative systems for district governance that engage multiple and diverse stakeholder groups, including school and district personnel, families, community stakeholders, and board members.
- Component 7.3 Program completers understand and demonstrate the capacity to evaluate, engage in decision making around, implement, and appropriately communicate about district, state, and national policy, laws, rules, and regulations.
- Component 7.4 Program completers understand the implications of larger cultural, social, economic, legal, and political interests, changes, and expectations and demonstrate the capacity to evaluate and represent district needs and priorities within larger policy conversations and advocate for district needs and priorities at the local, state, and national level.