Managing School Finance, Facilities, & Contracts  
EDL 530  
Department of Educational Leadership  
Western Illinois University

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Office Hours: T 12:00-2:00 pm  
Th 12:00-3:00 pm  
After class

Course Description

EDL 530: Managing School Finance, Facilities, & Contracts  
Students will develop skills in fiscal, facility and contract management. The course will review  
basic Illinois funding, budgeting, and fiscal reporting requirements. An emphasis will be placed  
on budget administration of local, state, and federal educational grant programs as well as a  
fundamental understanding of revenue/expenditure process. Facility (buildings and grounds)  
management as it relates to student learning, instructional practices, and student  
safety/compliance issues will be addressed. Finally, the collective bargaining agreement (CBA)  
will be reviewed as it relates to student learning and building management. Students will  
complete assignments on budget, facility, and contract issues. Individual student participation in  
class discussion is expected.

Prerequisites

Student should be admitted to the program, have completed EDL 500 and EDL 505, or has  
obtained permission of the instructor.

Purpose

School districts continue to be held accountable for limited resources (revenues) and the  
utilization of those resources (expenditures). This course is designed to introduce future  
principals to the financial role played by building administrators within the framework of the of  
the school district budget; to the building administrator's responsibilities in facility management;  
and to the principal's role relative to the collective bargaining agreement (CBA).
Objectives

The student will

1. Define the major financial, facility and contract terms commonly used by administrators. (ACTIVITY 1)
2. Define the various school financial resources available online at ISBE. (ACTIVITY 2)
3. Explain the basics of elementary or high school budgeting practices. (ACTIVITY 3)
4. Understand the building principal’s role in the budgeting process. (ACTIVITY 4)
5. Assess building inventory, purchasing procedures, employee/student schedules as they relate to student learning, risk management, safety and security, ADA compliance, and the alignment of resources with the achievement of vision and goals. (ACTIVITY 5)
6. Understand the complexities and importance of proper ESP management through the use job descriptions and evaluation instrument. (ACTIVITY 6)
7. Analyze and be able to read the school/district budget pertaining to building program operations including local, state, and federal grants. (ACTIVITY 7)
8. Understand cash management practices and ethical considerations surrounding activity fund accounts and vendor legalities. (ACTIVITY 8)
9. Critically review CBA components as they affect quality instruction, student learning, and resource alignment to achieve vision and goals. (ACTIVITY 9)
10. Demonstrate the ability to determine a district’s financial status. (ACTIVITY 10)
11. Demonstrate the ability to support communication and collaboration both with internal and external publics regarding school expenditures. (ACTIVITIES 1-10)

Required Texts


To purchase a copy that will be shipped directly to you, visit: http://www.lulu.com/shop/thomas-a-kersten/taking-the-mystery-out-of-illinois-school-finance-8th-edition/paperback/product-22274573.html
# Calendar of Topics (Tentative)

<table>
<thead>
<tr>
<th>Date</th>
<th>Topics</th>
<th>Readings</th>
<th>Due</th>
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<tbody>
<tr>
<td><strong>Weekend 1</strong>&lt;br&gt;Day 1&lt;br&gt;AM</td>
<td>Introductory Survey&lt;br&gt;Syllabus Review/Instructor Materials&lt;br&gt;Power Point &amp; Discussion: Course Activities, Assessments &amp; Objectives&lt;br&gt;Building Inventories (Bring Weekend 2)&lt;br&gt;Technology Inventories (Bring Weekend 2)&lt;br&gt;ISBE Websites: <a href="http://www.isbe.net">www.isbe.net</a>&lt;br&gt;www.isbe.net/finance etc.&lt;br&gt;IOWA Websites: <a href="http://www.edinfo.state.i.a.us/data/financereport.asp">www.edinfo.state.i.a.us/data/financereport.asp</a>&lt;br&gt;www.educateiowa.gov&lt;br&gt;www.dom.state.i.a.us/local/schools/archive.html</td>
<td>A. Syllabus&lt;br&gt;B. Weekend Activities Document</td>
<td>Bring: to each class Laptop &amp; Calculator&lt;br&gt;<strong>Weekend 1:</strong>&lt;br&gt;1. Be prepared to state if your district maintains copies of building &amp; technology inventories.&lt;br&gt;2. Bring a copy of a support staff job description and evaluation instrument for it.&lt;br&gt;3. Bring an electronic copy of your district CBA</td>
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<tr>
<td><strong>Weekend 1</strong>&lt;br&gt;Day 1&lt;br&gt;PM</td>
<td>District Types&lt;br&gt;Funding Fairness&lt;br&gt;Role of Taxation (Taxation Types)&lt;br&gt;Educational Disparities</td>
<td>WOL Readings 1&lt;br&gt;WOL Readings 2&lt;br&gt;WOL Readings 6&lt;br&gt;WOL Readings 8</td>
<td></td>
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<tr>
<td><strong>Weekend 1</strong>&lt;br&gt;Day 2&lt;br&gt;AM</td>
<td>Illinois Budget Disaster&lt;br&gt;Budget 101&lt;br&gt;District Financial Profile&lt;br&gt;Tax Cut for the Rich&lt;br&gt;Memphis Board of Education&lt;br&gt;Tax Levy Article</td>
<td>WOL Readings 3&lt;br&gt;WOL Readings 4&lt;br&gt;WOL Readings 5&lt;br&gt;WOL Readings 9&lt;br&gt;WOL Readings 10&lt;br&gt;WOL Readings 11</td>
<td><strong>Readings Fill-in Assignment Sheet in WOL Assessment Folder for 3 &amp; 4</strong></td>
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<tr>
<td><strong>Weekend 1</strong>&lt;br&gt;Day 2&lt;br&gt;PM</td>
<td>Economics of Education&lt;br&gt;Financing Education Adequately&lt;br&gt;Financing Education Equitably</td>
<td>Lecture-Discussion</td>
<td>Chapter PowerPoint Folder</td>
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<tr>
<td><strong>Weekend 2</strong>&lt;br&gt;Day 1&lt;br&gt;AM</td>
<td>Sources of Revenue&lt;br&gt;Administering the School Budget&lt;br&gt;Human Resources/School Budget</td>
<td>Lecture-Discussion</td>
<td>Chapter PowerPoint Folder</td>
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<tr>
<td><strong>Weekend 2</strong>&lt;br&gt;Day 1&lt;br&gt;PM</td>
<td>Illinois Funding, Budgeting &amp; Accounting&lt;br&gt;Property Tax, PTELL / &quot;Tax Cap&quot;&lt;br&gt;General State Aid (GSA) and the CPPRT</td>
<td>Lecture-Discussion&lt;br&gt;Fritts Text: 1-6</td>
<td>Class PowerPoint Folder</td>
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<tr>
<td><strong>Weekend 2</strong>&lt;br&gt;Day 2&lt;br&gt;AM</td>
<td>Illinois Foundation System&lt;br&gt;Local, State &amp; Federal Revenues&lt;br&gt;Fund, Function, Object, &amp;ISBE Budget Form</td>
<td>Fritts Study Guide in Assignment Folder</td>
<td>Class PowerPoint Folder</td>
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<tr>
<td><strong>Weekend 2</strong>&lt;br&gt;Day 2&lt;br&gt;PM</td>
<td>Annual Statement Publication&lt;br&gt;Tax Levies&lt;br&gt;Truth-in-Taxation (T-n-T)</td>
<td>Annual Report for Publication Folder&lt;br&gt;Tax Levy Folder&lt;br&gt;T-n-T Folder</td>
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| Weekend 3 Day 1 AM | SFOT Finance Worksheets  
| Basic Labor Law  
| Basic Collective Bargaining | SFOT Folder  
| WOL Finance Worksheet Folder  
| WOL Labor Law & CBA Folder |
|-------------------|-----------------------------|
| Weekend 3 Day 1 PM | Any & All Not Completed  
| Activity Presentations Due  
| All Assignments Due |
|-------------------|-----------------------------|
| Weekend 3 Day 2 AM | Instructor Evaluation  
| I Used to Think...and Now I Think... |
|-------------------|-----------------------------|
| Weekend 3 Day 2 PM | Final Exam (12:00 Noon-1:30 PM) |
Assessment

Grades for this course are determined by scores on the five assessment activities listed in the table below. The total of the scores is 348. Additional activities, assignments, readings etc. may be required up to 100 points.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Points</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Fritts Guide</td>
<td>58</td>
<td>Provided by instructor. Each correct answer = 1 point</td>
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<tr>
<td>2. School Financial Resources - Online</td>
<td>15</td>
<td>Points equal number of correct answers.</td>
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<tr>
<td>3. Budgeting Elementary or High School</td>
<td>20</td>
<td>Summary of either Chapter 17 or 18 in Fritts. Demonstrate by: PPT, Prezi, Bulleted Flat-sheet or Written Report</td>
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<tr>
<td>4. Interview</td>
<td>15</td>
<td>Interview administrator about budgeting process: Use form provided</td>
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<td>5. Facility Projects</td>
<td>20</td>
<td>A. Purchase Orders (audit trail): From Order to Payment Process</td>
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<td>B. Bullying (Safety): Procedures to halt bullying in your building</td>
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<tr>
<td>6. CBA</td>
<td>20</td>
<td>Evaluate a job description v. the corresponding job evaluation tool</td>
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<tr>
<td>7. &quot;Read a Budget&quot;</td>
<td>20</td>
<td>Locate and record from a selected category: salary, benefits, purchased services, supplies &amp; materials</td>
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<tr>
<td>8. Cash Management</td>
<td>20</td>
<td>Summary of your district’s methods, processes, procedures used to manage cash revenue from athletic activities, boosters, PTA fundraisers, vendors (pop, candy, water, coffee): Demonstrate: PPT, Prezi, Bulleted Flat-sheet or Written Report</td>
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<td>9. Analyze a CBA</td>
<td>20</td>
<td>Find item(s) that are potentially problematic or currently troublesome as they relate to the teaching &amp; learning process</td>
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<td>10. Financial Analysis</td>
<td>25</td>
<td>Analyze your district’s 4 operating funds for the last 3 years: Fund Balances, financial profiles, projections, kudos. (May be done with 1 or 2 others but must be different school districts.) Demonstrate: PPT, Prezi, Bulleted Flat-sheet or Written Report</td>
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<tr>
<td>11. Participation</td>
<td>30</td>
<td>Up to 5 points a day (Must be present to win!)</td>
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<tr>
<td>12. Final Exam</td>
<td>85</td>
<td>Each correct answer = 1 point</td>
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Grading

<table>
<thead>
<tr>
<th>Points</th>
<th>Grade</th>
<th>Notes</th>
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<tbody>
<tr>
<td>348 - 331</td>
<td>A</td>
<td></td>
</tr>
<tr>
<td>330 - 313</td>
<td>B</td>
<td></td>
</tr>
<tr>
<td>312 - 296</td>
<td>C</td>
<td></td>
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<tr>
<td>295 - 278</td>
<td>D</td>
<td></td>
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<tr>
<td>278 - 0</td>
<td>F</td>
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</tbody>
</table>

Additional Resources

References

Assessment of school-based management – October, 1996

ECS Education Policy Issues: School Finance, equity, adequacy discussed
http://www.ecs.org/html/IssueSection.asp?issueid=48=Other+Web+Sites

Illinois State Board of Education
www.isbe.net/finance

I LEARN Illinois Local Education Agency Retrieval Network
www.webprod.isbe.net/ilearn/ASP/index.asp

Interactive Illinois Report Card
www.iirc.niu.edu

Publisher: Eye On Education, Larchmont, N. Y.
Project Instructions

1. **Fritts Study Guide Assignment**: Complete study guide as assigned by instructor after reading Essentials of Illinois School Finance text. *DUE Weekend 2*

2. **School Finance Resources Online Assignment**: Students will search state websites to secure financial information. *DUE Weekend 1*

3. **Budgeting—High School or Elementary Level Assignment**: Groups will summarize and prepare a presentation on either Chapter 17 or 18 in the Fritts text. *DUE Weekend 3*

4. **Administrator Interview Assignment**: Interview a principal or other administrator using the form provided. *Due Weekend 3*

5. **Facility Project Assignment**: Students will summarize their district's processes and/or procedures for the following:
   - Purchase Orders/audit trail
   - Bullying prevention
   *DUE Weekend 3*

6. **CBA Assignment**: Select an ESP job description and compare job duties and expectations as defined in the job description with the evaluation instrument used for that particular ESP. The question is: Do the job description and the evaluation instrument line up or they dissimilar thereby providing a possible future wrongful termination situation. *DUE WEEKEND 3*

7. **Read a Budget Assignment**: Locate and record from a selected category:
   - salary, benefits, purchased services, supplies & materials *DUE Weekend 3*

8. **Cash Management Assignment**: Summary of your district's methods, processes, procedures used to manage cash revenue from athletic activities, boosters, PTA fundraisers, vendors (pop, candy, water, coffee):
   - Demonstrate: PPT, Bulleted Flat-sheet or Written Report

9. **Analyze a CBA**: You are a new principal. Review a CBA from another district to find item(s) that you believe could be potentially problematic or currently troublesome as they relate to the teaching & learning process of your new school. *DUE WEEKEND 3*

10. **Financial Analysis Assignment**: Analyze your district’s 4 operating funds for the last 3 years:
    - Total revenues, expenditures, financial profiles, projections, kudos.
    - (May be done with 1 or 2 others but must be different school districts.) Presentation to class.
    - Demonstrate: PPT, Prezi, Bulleted Flat-sheet or Written Report *DUE Weekend 3*

11. **Participation**: Student must be present the entire class period to receive full 5 points.

12. **Final Exam Assignment**: Short answer questions and 1 essay question.

13. **OTHER**: Various Assignments/Activities & Readings: As deemed necessary by Instructor.
Policies and Expectations

Attendance
A 500-level student who is absent for more than 50% of a scheduled day of a Weekend Academy class will be assigned a grade of incomplete (I) by the instructor and must make up the appropriate day in its entirety the next time the course is offered in order to change the Incomplete to a letter grade. If a student is absent for more than 50% of the first day of a weekend academy class, the instructor may, at his or her discretion, either exclude the student from attending the class or award an incomplete under this attendance policy.

If a 600-level student is absent for more than 50% of a scheduled day of a weekend academy, the instructor may assign an Incomplete (I) and require that the student make up the appropriate day the next time the course is offered. Under rare circumstances, the instructor may elect to assign the student additional activities to demonstrate that the student has accomplished the course outcomes missed in class. If this option is chosen, then in advance of completion, the instructor will report to the Chair the name of the student, time missed, and a summary of the work assigned as make up.

Incomplete Grade for Missing Course Requirements
An incomplete grade may be given only when a student, due to circumstances beyond his or her control, is unable to complete course requirements within the official limits of the term. The instructor may allow additional time for completion of the requirements after consideration of a written petition from the student to the instructor. The petition must include what the student will do to complete the requirement and the expected date of completion of the incomplete requirements.

Academic Accommodations
In accordance with University policy and the Americans with Disabilities Act (ADA), academic accommodations may be made for any student who notifies the instructor of the need for an accommodation. For the instructor to provide the proper accommodation(s) you must obtain documentation of the need for an accommodation through Disability Resource Center (DRC) and provide it to the instructor. It is imperative that you take the initiative to bring such needs to the instructor’s attention, as he/she is not legally permitted to inquire about such particular needs of students. Students who may require special assistance in emergency evacuations (i.e. fire, tornado, etc.) should contact the instructor as to the most appropriate procedures to follow in such an emergency. Contact Disability Resource Center (DRC) at 298-2512 for additional services.

WIU Academic Dishonesty Policy
The University can best function and accomplish its objectives in an atmosphere where high ethical standards prevail. For this reason, and to insure that the academic work of all students will be fairly evaluated, the University strongly condemns academic dishonesty. The most prevalent forms of academic dishonesty are cheating and plagiarism. Dishonesty of any kind with respect to examinations, course assignments, alteration of records, or illegal possession of examinations shall be considered cheating. It is the responsibility of the student to not only abstain from cheating, but also to avoid making it possible for others to cheat. Any student who knowingly helps another student cheat is as guilty of cheating as the student he or she assists.

The submission of the work of someone else as one’s own constitutes plagiarism. Academic honesty requires that ideas or materials taken from another course for use as a course paper or project be fully acknowledged. Plagiarism is a very serious offense in whatever form it may appear, be it submission of an entire article falsely represented as the student's own, the inclusion within a piece of the student's writing of an idea for which the student does not provide sufficient documentation, or the inclusion of a documented idea not sufficiently assimilated into the student's language and style.

Academic Integrity
The link to the WIU Student Academic Integrity policy is: http://www.wiu.edu/policies/acintegrity.php.
Vision and Mission Statements

Teacher and Professional Education Program vision statement

Our graduates will be empowered educational professionals deeply committed to continuous learning and the empowerment of all learners.

Department of Educational Leadership vision statement

To be one of the premiere educational leadership programs in the nation.

Teacher and Professional Education Program mission statement

The WIU Teacher and Professional Education Program empowers candidates to become educational practitioners who engage in informed action that is grounded in knowledge and reflection; who are deeply committed to the highest standards of professional practice; who are able to adapt to emerging social, economic, and cultural landscapes; who are skilled in the use of technological tools that promote teaching and learning; and who are committed to empowering all learners.

Department of Educational Leadership mission statement

We will:

Recruit a capable, diverse student body.

Focus on continuous improvement of our programs.

Create a more meaningful clinical internship.

Establish a series of knowledge and application assessments.

Cultivate effective internal and external relationships.