**School Finance**  
EdLd 675 – 3 Credits – CRN 39541 & 34575  
**2014 - Spring Term Syllabus**  
April 11, 12; May 2, 3; May 30,31

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**Brett Yancey**  
Director of Business Operations  
Springfield Public Schools

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<thead>
<tr>
<th>Phone:</th>
<th>541-514-2468 (Cell)</th>
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<tbody>
<tr>
<td>E-mail:</td>
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<tr>
<td>Address:</td>
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<td>Office Hours:</td>
<td>Call to make an appointment</td>
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**DESCRIPTION**  
The School Finance class is designed to introduce students to the areas of budgeting and financial planning for K-12 schools/school districts. Various topics will be introduced and discussed such as; State School Fund Formula, differing approaches to building a budget, responsibilities of the budget, budget planning, forecasting, budget adjustments, long-term planning, other funding sources, and ethics (related to finance).

**OBJECTIVES**  
1. Understand Oregon Budget Law and the requirements of budgeting for school districts.  
2. Understand the State School Fund Formula and how the formula components work together.  
3. Understand the approach to budgeting (who does what, when & why?)  
4. Understand the information required to construct a budget and how that information is used.  
5. Understand the concepts of developing a budget and what values should be considered.  
6. Understand the various types of budget adjustments and how to react/revise an operating budget.  
7. Understand the importance of budget analysis and reporting requirements.

**TEXTBOOKS & READING MATERIALS**  
Assigned readings will be pdf copies, as well as online resources – see ZipTrain for specifics.

**COURSE STRUCTURE**  
This course is a combination of readings, online presentations, research, group discussions and group projects. This course will be web-based and there will be no scheduled face-to-face meeting(s). Group work and dialogue will be expected and group projects will be encouraged (but not required).

**PAPERS / Assignments**  
Each class session, students may be asked to complete an in-class assignment listed on Adobe Connect. Remember that responses are to be submitted with the following file name: YourLastName_AssignmentName.doc or YourLastName_AssignmentName.docx. The Final assignment will be an article review. The article review format is posted on Adobe Connect.
GRADING POLICY
Your final grade for this course will be determined based on the following course activities and assignments:

* Attendance & participation in discussion sections 1/3 or 34%
* In-class assignments, group assignments & written assignments 1/3 or 33%
* Final project 1/3 or 33%

Please note that if this class is taken P/NP, 70% or higher is required to pass the class.

SCHEDULE OF TOPICS AND READINGS

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<th>WEEK</th>
<th>DAY</th>
<th>Time</th>
<th>TOPIC</th>
<th>READINGS &amp; EXERCISE</th>
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| 2    | Friday 4/11 | Online 5:00pm – 8:50pm | Macro-budgeting (“The big picture” with some history) | READINGS: No readings prior to class  
EXERCISE: Fill out information sheet prior to class and submit via email (brett.yancey@springfield.k12.or.us) |
| 2    | Saturday 4/11 | Group Work 9:00am-12:00am | State School Fund | READINGS: 1) State School Fund Formula & Components  
2) State School Fund Formula Sheet (District specific)  
3) State School Fund Formula – ADMw Sheet (District specific) |
| 5    | Friday 5/02 | Offline 5:00pm – 8:50pm | Considerations to building budgets | READINGS: 1) Report on Adequacy of Public Education Funding (November 2011)  
2) From Goal to Reality: 40-40-20 (May 2012) |
| 5    | Saturday 5/03 | Group Work 9:00am-12:00am | Beginning steps of building a budget | READINGS: 1) Local Budget Manual (chapters 3, 4, 7, 8, 11)  
2) Local Budgeting in Oregon  
3) K-12 Chart of Accounts (reference material) |
| 9    | Friday 5/30 | Offline 5:00pm – 8:50pm | Constructing a budget (part I) | READINGS: No readings prior to class |
| 9    | Saturday 5/31 | Group Work 9:00am-12:00am | Constructing a budget (part II) | READINGS: No readings prior to class |
ATTENDANCE POLICY

Attendance is required to succeed in this course and master the course material. If a student does miss class, it is the student’s responsibility to get class notes, and handouts or other distributed materials. Contact the instructor in case of illness or emergencies that preclude completing assignments as scheduled or attending class sessions. Messages can be left on the instructor’s voice mail or e-mail at any time of the day or night, prior to class. If no prior arrangements have been made before class time, the absence will be unexcused.

ABSENCE POLICY

Students must contact the instructor in case of illness or emergencies that preclude attending class sessions or taking quizzes as scheduled. Messages can be left on the instructor’s voice mail or e-mail at any time prior to class. If no prior arrangements have been made before class time, the absence will be unexcused.

If you are unable to complete an assignment due to a personal and/or family emergency, you should contact your instructor or discussion leader as soon as possible. On a case-by-case basis, the instructor will determine whether the emergency qualifies as an excused absence.

EXPECTED CLASS BEHAVIOR

Classroom expectations include:
1. Participating in class activities
2. Respecting the diversity of cultures, opinions, viewpoints in the classroom
3. Listening to fellow students, professors, and lecturers with respect
4. Arriving on time, prepared for class
5. Attending for the duration of class
6. Not reading other materials, books, newspapers, or using laptops for other activities
7. Turn off cell phones and other electronic devices
8. Racist, homophobic, sexist, and other disrespectful comments will not be tolerated

Diversity

It is the policy of the University of Oregon to support and value diversity. To do so requires that we:
1. respect the dignity and essential worth of all individuals.
2. promote a culture of respect throughout the University community.
3. respect the privacy, property, and freedom of others.
4. reject bigotry, discrimination, violence, or intimidation of any kind.
5. practice personal and academic integrity and expect it from others.
6. promote the diversity of opinions, ideas and backgrounds which is the lifeblood of the university.

Documented Disability

Appropriate accommodations will be provided for students with documented disabilities. If you have a documented disability and require accommodation, arrange to meet with the course instructor within the first two weeks of the term. The documentation of your disability must come in writing from the Accessible Education Center in the Office of Academic Advising and Student Services. Disabilities may include (but are not limited to) neurological impairment, orthopedic impairment, traumatic brain injury, visual impairment, chronic medical conditions, emotional/psychological disabilities, hearing impairment, and learning disabilities. For more information on Accessible Education Center, please see http://aec.uoregon.edu
Mandatory Reporting
UO employees, including faculty, staff, and GTFs, are mandatory reporters of child abuse and prohibited discrimination. This statement is to advise you that that your disclosure of information about child abuse or prohibited discrimination to a UO employee may trigger the UO employee’s duty to report that information to the designated authorities. Please refer to the following links for detailed information about mandatory reporting:
https://hr.uoregon.edu/policies-leaves/general-information/mandatory-reporting-child-abuse-and-neglect/presidents-message
http://around.uoregon.edu/mandatoryreporting

Academic Misconduct Policy
All students are subject to the regulations stipulated in the UO Student Conduct Code http://conduct.uoregon.edu). This code represents a compilation of important regulations, policies, and procedures pertaining to student life. It is intended to inform students of their rights and responsibilities during their association with this institution, and to provide general guidance for enforcing those regulations and policies essential to the educational and research missions of the University.

Conflict Resolution
Several options, both informal and formal, are available to resolve conflicts for students who believe they have been subjected to or have witnessed bias, unfairness, or other improper treatment.

It is important to exhaust the administrative remedies available to you including discussing the conflict with the specific individual, contacting the Department Head, or within the College of Education, you can contact Angie Whalen, Assistant Dean for Academic Programs and Student Services, at 346-2898 or awhalen@uoregon.edu; Lauren Lindstrom, Associate Dean for Research and Academic, at 346-1399 or lindstrm@uoregon.edu ; or Surendra Subramani, Diversity Coordinator, at 346-1472 or surendra@uoregon.edu.

• Outside the College, you can contact:
  • UO Bias Response Team: 346-1139 or http://bias.uoregon.edu/whatbrt.htm
  • Conflict Resolution Services 346-0617 or
    http://studentlife.uoregon.edu/SupportandEducation/ConflictResolutionServices/tabid/134/Default.aspx
  • Affirmative action and Equal Opportunity: 346-3123 or http://aaeo.uoregon.edu/

Grievance Policy
A student or group of students of the College of Education may appeal decisions or actions pertaining to admissions, programs, evaluation of performance and program retention and completion. Students who decide to file a grievance should follow the student grievance procedure, or alternative ways to file a grievance outlined in the Student Grievance Policy (https://education.uoregon.edu/academics/student-grievance) or enter search: student grievance.

In Case of Inclement Weather
In the event the University operates on a curtailed schedule or closes, UO media relations will notify the Eugene-Springfield area radio and television stations as quickly as possible. In addition, a notice regarding the university’s schedule will be posted on the UO main home page (in the “News” section) at http://www.uoregon.edu. Additional information is available at http://hr.uoregon.edu/policy/weather.html.

If an individual class must be canceled due to inclement weather, illness, or other reason, a notice will be posted on Blackboard or via email. During periods of inclement weather, please check Blackboard and your email rather than contact department personnel. Due to unsafe travel conditions, departmental staff may be limited and unable to handle the volume of calls from you and others.

Course Incomplete Policy
Students are expected to be familiar with university policy regarding grades of “incomplete” and the time line for completion. For details on the policy and procedures regarding incompletes, Please see: https://education.uoregon.edu/academics/incompletes-courses