

Competent Management of Financial Resources 2244
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Ed.D. Program/ School of Education
University of Pittsburgh
TLL 3101 SEC 1060
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Contact Information

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Office Hours	Zoom Available any time/In-Person by Appointment

Classes will meet the following days in-person

January 13, 2024

February 3, 2024

March 2, 2024

April 6, 2024

As a practicing superintendent, one of the many responsibilities that you will have is to oversee the financial operations of the school district.

In Pennsylvania, as in many other states, the school business official plays a pivotal role in the responsible and effective management of a school district's resources, ensuring that funds are allocated wisely to support the educational mission and the needs of students. The superintendent, however has the final responsibility of the financial operations of the school district,

This course will provide the student with a comprehensive overview of all aspects of the financial operation of the school district. Through selected reading rescors, presentations from practitioners in the field, simulations and in-class activities we will cover some of the following topics;

Developing and managing the school district's budget, ensuring it aligns with educational priorities and complies with state regulations.

Overseeing financial reporting, including revenue and expenditure analysis, and providing regular updates to the school board and administration.

Managing payroll, accounts payable, and accounts receivable processes.

Purchasing and Procurement:

Overseeing the procurement of goods and services for the school district, ensuring compliance with

procurement laws and best practices.

Negotiating contracts with vendors and suppliers to secure cost-effective solutions

Facilities Management:

Managing the maintenance and improvement of school facilities, including buildings and grounds.

Coordinating capital projects and renovations, including budgeting, planning, and execution.

Human Resources

Managing personnel matters, including recruitment, hiring, and benefits administration.

Ensuring compliance with labor laws, collective bargaining agreements, and personnel policies.

Risk Management:

Implementing risk mitigation strategies, such as insurance coverage and safety protocols, to protect the school district's assets and minimize liability

Compliance and Reporting:

Ensuring compliance with federal and state laws related to education finance, including filing required reports and documentation.

Providing financial data and reports to state and local authorities as needed.

Policy and Regulation:

Assisting in the development and revision of school district policies and regulations, particularly those related to finance and operations.

Long-Term Planning:

Collaborating with school board members and administrators on long-term financial planning and forecasting to support the district's strategic goals.

Community Engagement:

Engaging with the community, parents, and stakeholders to communicate financial matters and build trust.

Professional Development:

Staying current with changes in education finance laws, regulations, and best practices through ongoing professional development.

Emergency Management:

Developing and implementing emergency preparedness plans for the school district, ensuring the safety and well-being of students and staff during crises.

Understanding the political implications of budgeting and finance in a school district.

Resources for this course will be located in Canvas Modules and will be provided as needed.

Required Readings for the Course

Keagy, Dale R. and Piper, David M. (2020) *Pennsylvania School Business A Guide for Educational Administrators Fifth Edition*. Pennsylvania Association of School Business Officials. Harrisburg, Pennsylvania.

Levenson, Nathan (2015) *A Better Way to Budget Building Support for Bold Student-Student Centered Change in Public Schools*. Harvard Education Press.

The following is a list of tentative activities for the in-class sessions.

January 13, 2024

1. Introduction to course
2. Presentation from Practicing Business Manager Robert Geletko
3. Group Activity on Chapters 1-4 *Pennsylvania School Business A Guide for Educational Administrators Fifth Edition*. (Budget Concept Law, Budget Prep, Budget Presentation and Planning
4. Simulation Activity/Discussion
5. Questions/ Reflections

February 3, 2024

1. Chapters 5-7 *Pennsylvania School Business A Guide for Educational Administrators Fifth Edition*. (Financial Reporting, Debts and Investments, Student Activities)
2. Presentation from Bond Investment Company
3. Simulation Activity
4. Book Discussion *A Better Way to Budget*
5. Questions/ Reflections

March 2, 2024

1. Chapters 8, 9, 12, 14. *Pennsylvania School Business A Guide for Educational Administrators Fifth Edition*. Purchasing, Pupil Transportation, Taxation, Collective Bargaining
2. Presentation from Ira Weiss from Weiss, Burkardt and Kramer
3. Book Discussion Part 2, *A Better Way to Budget*
4. Questions/ Reflections

April 6, 2024

1. Chapters 10, 11, 13, 15. *Pennsylvania School Business A Guide for Educational Administrators Fifth Edition*. Facilities, Food Service, Human Resources, Compensation and Benefits
2. Presentation from Practicing Superintendent Dr. Randal Lutz

3. Case Studies/Simulation
4. Questions/Reflection

Evaluation

<i>Items for Evaluation</i>	<i>Points</i>	<i>Due</i>
Participation/Attendance	40	NA
Business Manager Reflection	15	2/3
Bond Company Reflection	15	3/2
Lawyer Reflection	15	4/6
School Superintendent Reflection	15	TBD
School Budget Report	20	TBD
Total Points	120	

University-Provided Academic Policies

Academic Integrity

Include repercussions for failure to adhere to policy. Students in this course will be expected to comply with the University of Pittsburgh's Policy on Academic Integrity. Any student suspected of violating this obligation for any reason during the semester will be required to participate in the procedural process, initiated at the instructor level, as outlined in the University Guidelines on Academic Integrity. This may include, but is not limited to, the confiscation of the examination of any individual suspected of violating University Policy. Furthermore, no student may bring any unauthorized materials to an exam, including dictionaries and programmable calculators. To learn more about Academic Integrity, visit the Academic Integrity Guide for an overview of the topic. hands-on practice, complete the Understanding and Avoiding Plagiarism tutorial.

Disability Services

If you have a disability for which you are or may be requesting an accommodation, you are encouraged to contact both your instructor and Disability Resources and Services(DRS), 140 William Pitt Union, (412) 648-7890,drsrecep@pitt.edu,(412) 228-5347 for P3 ASL users, as early as possible in the term. DRS will verify your disability and determine reasonable accommodations for this course.

Health and Safety Statement

In the midst of this pandemic, it is extremely important that you abide by public health regulations and

University of Pittsburgh health standards and guidelines. These rules have been developed to protect the health and safety of all community members. For the most up-to-date information and guidance, please visit coronavirus.pitt.edu and check your Pitt email for updates before each class.

Accessibility

The Canvas LMS platform was built using the most modern HTML and CSS technologies, and is committed to W3C's Web Accessibility Initiative and Section 508 guidelines. Specific details regarding individual feature compliance are documented and updated regularly.

Attendance

The teacher education faculty at the University of Pittsburgh view our courses as communities of practice. This means that we gather for collective critical inquiry and reflection that is focused on building shared knowledge over time. To be an active member of our community of practice, it is important to attend face to face courses prepared to engage with the course instructor, course colleagues, and course materials. While we believe course attendance adds value to the community of practice, we also know there may be times when students must miss class to attend to other needs. In these cases, you are afforded up to one absence per course hour. This means since this course meets one time per month for 4 hours. Attendance will be taken at the start of each class and will be factored into final grade. Students are responsible for all content covered in missed sessions. There are several graded in class activities if these sessions are missed student will not earn points unless they arrange for alternate assignments.

Diversity and Inclusion

The University of Pittsburgh does not tolerate any form of discrimination, harassment, or retaliation based on disability, race, color, religion, national origin, ancestry, genetic information, marital status, familial status, sex, age, sexual orientation, veteran status or gender identity or other factors as stated in the University's Title IX policy. The University is committed to taking prompt action to end a hostile environment that interferes with the University's mission. For more information about policies, procedures, and practices, see: <http://diversity.pitt.edu/affirmative-action/policies-procedures-and-practices>. Everyone in the class please help ensure that other members of this class can learn in a supportive and respectful environment. If there are instances of the aforementioned issues, please contact the Title IX Coordinator, by calling 412-648-7860, or e-mailing titleixcoordinator@pitt.edu.

Reports can also be filed online: <https://www.diversity.pitt.edu/make-report/report-form>. You may also choose to report this to a faculty/staff member; they are required to communicate this to the University's Office of Diversity and Inclusion.

If you wish to maintain complete confidentiality, you may also contact the University Counseling Center (412-648-7930).

Remote Instruction Statement

Please stay engaged in the course by communicating and interacting with me and your classmates. We will all be as flexible and adaptive as possible.

Copyright Notice

These materials may be protected by copyright. United States copyright law, 17 USC section 101, et seq., in addition to University policy and procedures, prohibit unauthorized duplication or retransmission of course materials. See Library of Congress Copyright Office and the University Copyright Policy.

Statement on Classroom Recording

To ensure the free and open discussion of ideas, students may not record classroom lectures, discussion and/or activities without the advance written permission of the instructor, and any such recording properly approved in advance can be used solely for the student's own private use.

Gender Inclusive Language Statement (from Pitt GSWS)

Language is gender-inclusive and non-sexist when we use words that affirm and respect how people describe, express, and experience their gender.

Just as sexist language excludes women's experiences, non-gender-inclusive language excludes the experiences of individuals whose identities may not fit the gender binary, and/or who may not identify with the sex they were assigned at birth.

Identities including trans, intersex, and genderqueer reflect personal descriptions, expressions, and experiences. Gender-inclusive/non-sexist language acknowledges people of any gender (for example, first year student versus freshman, chair versus chairman, humankind versus mankind, etc.). It also affirms non-binary gender identifications, and recognizes the difference between biological sex and gender expression. Students, faculty, and staff may share their preferred pronouns and names, and these gender identities and gender expressions should be honored.

Content Warning and Class Climate Statement (from Pitt GSWS)

Our course readings and classroom discussions will often focus on mature, difficult, and potentially challenging topics. As with any course in the Gender, Sexuality, and Women's Studies Program, course topics are often political and personal.

Readings and discussions might trigger strong feelings—anger, discomfort, anxiety, confusion, excitement, humor, and even boredom. Some of us will have emotional responses to the readings; some of us will have emotional responses to our peers' understanding of the readings; all of us should feel responsible for creating a space that is both intellectually rigorous and respectful. Above all, be respectful (even when you strongly disagree) and be mindful of the ways that our identities position us in the classroom.

I expect everyone to come to class prepared to discuss the readings in a mature and respectful way. If you are struggling with the course materials, here are some tips. You can approach your instructor

ahead of time if you'd like more information about a topic or reading. If you need to leave or miss class,

you are still responsible for the work you miss. If you are struggling to keep up with the work because of

the course content, you should speak with me and/or seek help from the counseling center.

Statement on Scholarly Discourse (from a California State University course: Race, Racism and Critical Thinking)

In this course we will be discussing very complex issues of which all of us have strong feelings and, in most cases, unfounded attitudes. It is essential that we approach this endeavor with our minds open to evidence that may conflict with our presuppositions.

Moreover, it is vital that we treat each other's opinions and comments with courtesy even when they diverge and conflict with our own.

Take Care of Yourself

Do your best to maintain a healthy lifestyle this semester by eating well, exercising, avoiding drugs and alcohol, getting enough sleep, and taking time to relax. Despite what you might hear, using your time to take care of yourself will actually help you achieve your academic goals more than spending too much time studying. All of us benefit from support and guidance during times of struggle. There are many helpful resources available at Pitt.

An important part of the college experience is learning how to ask for help. Take the time to learn about all that's available and take advantage of it. Ask for support sooner rather than later –this always helps.

If you or anyone you know experiences any academic stress, difficult life events, or difficult feelings like anxiety or depression, we strongly encourage you to seek support. Consider reaching out to a friend, faculty or family member you trust for assistance connecting to the support that can help.

The University Counseling Center is here for you: call 412-648-7930 and visit their website. If you or someone you know is feeling suicidal, call someone immediately, day or night:

University Counseling

Center (UCC): 412 648-7930 University Counseling Center Mental Health Crisis Response: 412-648-7930

x1Resolve Crisis Network: 888-796-8226 (888-7-YOU-CAN) If the situation is life threatening, call the

Police: On-campus: Pitt Police: 412-268-2121 Off-campus: 911