Rutgers University welcomes students with disabilities into all of the University’s educational programs. In order to receive consideration for reasonable accommodations, a student with a disability must contact the appropriate disability services office at the campus where you are officially enrolled, participate in an intake interview, and provide documentations: https://ods.rutgers.edu/students/documentation-guidelines. If the documentation supports your request for reasonable accommodations, your campus’s disability services office will provide you with a Letter of Accommodations. Please share this letter with your instructors and discuss the accommodations with them as early in your courses as possible. To begin this process, please complete the Registration form on the ODS web site at: https://ods.rutgers.edu/students/registration-form.

**Course Description**

**Learning goals:**

1) Students will demonstrate fluency in the topic of school finance, from state and federal finance policies to local decision making regarding the allocation of fiscal and human resources.

2) Students will demonstrate the ability to analyze and present school finance data, and develop policy prescriptions based on that analysis at the district and state level.

**Course catalog description:**
State and federal directives on school finance and educational equity; economic principles and national income measures related to public education; calculation of property taxes and bond issues; local, state, and federal methods of financing public education; overview of cost
efficiency and effectiveness measures; investments; the basic accounting structure of state and local governments; and the budget system and comprehensive annual reports used by school districts in New Jersey.

This course adheres to the Professional Standards for Educational Leaders of the National Policy Board for Educational Administration; see below for details.

**ALL REQUITRED READINGS WILL BE AVAILABLE AS DOWNLOADS ON THE CANVAS WEBSITE.**

**Grading policy:**

You will have three major assignments, including a final project broken up into two sections. Each assignment is in the form of a policy brief (no more than 10 pages, double-spaced, APA style, 12-point font) and an accompanying presentation you will make in class (10-15 minutes for midterm assignments, 15-20 minutes for the final project; the maximum time will be strictly enforced!).

Assignments are to be handed in on the assigned due date unless otherwise noted in class. Late assignments and other exceptions will be handled on an individual basis at the discretion of the instructor.

Each assignment for this class (except Part I of the Final Project) may be completed in collaboration with one other student, but no two assignments are to be done in the same pairings unless permission is granted. Any assignment may be submitted electronically by e-mail to mark.weber@gse.rutgers.edu

All assignments will include data analysis; Microsoft Excel is the preferred software package, although others are encouraged (especially Stata). You all will have varying degrees of comfort with Excel; if you are not comfortable making graphs in Excel, I *strongly* suggest you partner with someone who is on your first assignments. There will be plenty of work sessions to help guide you through the projects.
Grading Weights
- Final Project, Part 1 = 20%
- Final Project, Part 2 = 20%
- Mid-term Project 1 = 25%
- Mid-term Project 2 = 25%
- Class Participation = 10%

All assignments will be graded by rubrics that accompany the assignment descriptions you will receive in class.

For those of you who require it, these three major assignments will also make up your compiled Demonstration Task for this course which, when completed, will be uploaded to the course SAKAI site (Demonstration Task loading and rating): https://sakai.rutgers.edu/portal You will be responsible for converting your papers and presentation slide to PDF format, in a single file, for upload.

Academic Integrity Policy:
Any violation of academic honesty is a serious offense and is therefore subject to an appropriate penalty. Refer to http://academicintegrity.rutgers.edu/integrity.shtml for a full explanation of policies.

Web site: Please access the course website via Canvas. We will review logging on in class.
Course Requirements

Attendance Policy: Please make every effort to attend all classes. Contact me by email if you cannot attend in any week. Repeated absences will affect your final grade.

During class we will discuss the “required readings” listed below in the course schedule; please come to class prepared to participate in our discussions. “Optional Additional Readings” are not required but will be discussed in lectures; you may also wish to refer to them in your Final Project and Midterm Assignments.

Summary of Requirements

Final Project, Part #1
Due date: 10/3/18
Goal: Conduct a legal and historical analysis of a state’s educational funding system. Do not pick New Jersey! You will complete this project by yourself, even if you choose to work with a partner on the final project (your grade will be the higher of the two for this section).
Work Product: 3- to 5-page policy brief (DO NOT GO OVER THE MAXIMUM!) and 5- to 10-minute presentation.
I will have an exemplar essay available to you that uses New Jersey as an example. This essay will be the first part of your final project, and you will be able to rewrite it as you see fit before turning it in with the final project.
PSEL Standards: 3. h); 8. h), i); 10. d)

Midterm Assignment # 1: Understanding and Evaluating Equity in Within-District Resource Allocation across Schools
Due date: 10/24/18
Goal: Conduct and present a school-level equity analysis, using common data sources. The goal of this component is to determine whether the district you are studying has allocated resources in a way that improves or impedes adequacy & equity.
Work Product: 5- to 10-page policy brief (with 1 page exec summary) and 10- to 15-minute presentation.
PSEL Standards: 1. b); 3. c) h); 5. c); 9. a) b) c) d) f) g) h); 10. d)

Midterm Assignment #2: Understanding and Evaluating Equity and Efficiency in Fiscal and Human Resource Allocation within Schools
Due date: 11/28/18
Goal: Analyze school level resource allocations in relation to literature on efficient use of those resources.
Work Product: 5- to 10-page policy brief (with 1 page exec summary) and 10- to 15-minute presentation.
PSEL Standards: 1. b); 3. c) h); 5. c); 9. a) b) c) d) f) g) h); 10. d)

Final Project, Part II: State School Finance Policy & School District Revenues
Due date: 12/19/18
Goals: Understand and interpret school district revenues and state aid formulas; Understand and analyze school district equity, as provided through state aid formulas.

Work Product: 6- to 12-page policy brief (with 1 page exec summary) TOTAL – that’s Part I (which you already did!) and Part II together; accompanying presentation to the class (15-20 minutes).

Note: If you choose to work with a partner and you do a different state than the one you did for Part I, I will give you the higher grade – either the first draft or the final – as your final for this section.

PSEL Standards: 1. b); 3. c) h); 5. c); 9. a) b) c) d) f) g) h); 10. d)
# Course Schedule by Week

<table>
<thead>
<tr>
<th>Week</th>
<th>Topics to be Covered</th>
<th>Assignments &amp; Readings</th>
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<tbody>
<tr>
<td>Week 1</td>
<td>Course Introduction; Basics of Accounting; Introduction to Public School Finance</td>
<td><strong>Required Readings</strong></td>
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</table>
  *This is a good review of simple principles in accounting. I suspect most of you will have at least a basic grasp of the concepts presented, but take a few minutes to review the materials so we’re all on the same page.*  
|          |                                                          |  **Optional Additional Readings**  |
  *This is long so don’t read too deeply; just take a few minutes to look it over and get a sense of the issues involved.* |
| Week 2   | Budgets at the School Site Level; School Finance Data     | **Required Readings**  |
| 9/12/18  |                                                          |  - Get yourself caught up on last week’s readings.  
<p>|          |                                                          |  <strong>Optional Additional Readings</strong>  |</p>
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<thead>
<tr>
<th>Week 3</th>
<th>Economic Theories</th>
<th>Required Readings</th>
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<tbody>
<tr>
<td>9/19/18</td>
<td></td>
<td>Tiebout, C. M. (1956). A pure theory of local expenditures. <em>Journal of political economy</em>, 64(5), 416-424. Don’t worry if you don’t get this; it’s not easy. Just skim it and try to figure out what you can; we will discuss it in class.</td>
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<tr>
<th>Week 4</th>
<th>School Finance &amp; Segregation</th>
<th>Required Readings</th>
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<tr>
<td>Week 5</td>
<td>Equity and Adequacy, Part I</td>
<td>Final Assignment, First Draft (Part I only) Due!</td>
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<tr>
<td>10/3/18</td>
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<td>Required Readings</td>
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<td>Optional Additional Readings</td>
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<td><em>This is a long report; don’t try to read it all, but do spend some time on sections you find interesting so you can share with the class.</em></td>
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<tr>
<th>Week 6</th>
<th>Equity and Adequacy, Part II</th>
<th>Required Readings</th>
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<tr>
<td>10/10/18</td>
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<td></td>
<td></td>
<td>Optional Additional Readings</td>
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<tr>
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<td>• <em>Is School Funding Fair? A National Report Card Sixth Edition</em> (January 2017) <a href="http://www.schoolfundingfairness.org/is-school-funding-fair/reports">http://www.schoolfundingfairness.org/is-school-funding-fair/reports</a> Just skim this, we’ll discuss it in class.</td>
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<tr>
<td></td>
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<td>• <em>Is School Funding Fair? America’s Most Fiscally Disadvantaged School Districts Second Edition</em> (February 2017) <a href="http://www.schoolfundingfairness.org/is-school-funding-fair/reports">http://www.schoolfundingfairness.org/is-school-funding-fair/reports</a></td>
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<td>• “Data and Methods for Estimating Indicators for the School Funding Fairness Reports” <a href="http://www.schoolfundingfairness.org/is-school-funding-fair/reports">http://www.schoolfundingfairness.org/is-school-funding-fair/reports</a></td>
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<tr>
<th>Week 7</th>
<th>Efficiency &amp; Productivity</th>
<th>Required Readings</th>
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<tr>
<td>10/17/18</td>
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<tr>
<td>Week 8 10/24/18</td>
<td>Taxation</td>
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<td><strong>Midterm Assignment #1 Due!</strong></td>
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**Required Readings**

**Optional Additional Readings**
- ITPE’s “Who Pays?” [https://itep.org/whopays/](https://itep.org/whopays/) (Just glance through this)

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**Optional Additional Readings**

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[http://www.shankerinstitute.org/resource/publicschoolinefficiency](http://www.shankerinstitute.org/resource/publicschoolinefficiency)
**Week 9**  
10/31/18  

**Funding Formulas, Part I**  

**Required Readings**

- New Jersey School Boards Association, “New Jersey’s School Funding Formula 101.”  

- Thoughts on Improving SFRA:  

**Optional Additional Readings:**


- School Finance & Money Matters Basics:  

- New Jersey’s School Funding Reform Act  
  [http://nj.gov/education/sff/](http://nj.gov/education/sff/)


- Analysis of New Jersey’s Census-Based Special Education Funding System  

- Poverty Counts & School Funding:  

- Enrollment Count Methods:  

**Week 10**  
11/7/18  

**Funding Formulas, Part II**  

**Required Readings**


**Optional Additional Readings**


Week 11 11/14/18  “Choice” and School Finance  Required Readings


Optional Additional Readings


<table>
<thead>
<tr>
<th>NO CLASS 11/21/18</th>
<th>Change in designation</th>
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<tbody>
<tr>
<td>Week 12 11/28/18</td>
<td>Understanding Fiscal Resource Allocation in School Districts and Schools</td>
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**Required Readings**


**Optional Additional Readings**

- Baker, B. D. (2009). Within-district resource allocation and the marginal costs of providing equal...


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<thead>
<tr>
<th>Week 13 12/5/18</th>
<th>Human Resource Allocation in School Districts and Schools, Part I</th>
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<tbody>
<tr>
<td><strong>Required Readings</strong></td>
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<tr>
<td>- <strong>The Great Ongoing Teacher Debate:</strong></td>
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<table>
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<tr>
<th>Optional Additional Readings</th>
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<tr>
<td>- Fire first, ask questions later? Comments on Recent Teacher Effectiveness Studies <a href="https://schoolfinance101.wordpress.com/2012/01/07/fire-first-ask-questions-later-comments-on-recent-teacher-effectiveness-studies/">https://schoolfinance101.wordpress.com/2012/01/07/fire-first-ask-questions-later-comments-on-recent-teacher-effectiveness-studies/</a></td>
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<tr>
<td>Week 14</td>
<td>Human Resource Allocation in School Districts and Schools, Part II</td>
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<tr>
<td>12/12/18</td>
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**Required Readings**

- More of The Great Ongoing Teacher Debate
  - NEPC Review: The Widget Effect: Our National Failure to Acknowledge and Act on Teacher Differences [http://nepc.colorado.edu/thinktank/review-widget-effect](http://nepc.colorado.edu/thinktank/review-widget-effect)

**Optional Additional Readings**


**Week 15**

<table>
<thead>
<tr>
<th>12/19/18</th>
<th>Final Presentations and Course Wrap-Up</th>
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**Final Project Due!**
Professional Standards for Educational Leaders

This course adheres to the following Professional Standards for Educational Leaders of the National Policy Board for Educational Administration:

Standard 1. Mission, Vision, And Core Values
Effective leaders:
(a) Develop an educational mission for the school to promote the academic success and well-being of each student.
(b) In collaboration with members of the school and the community and using relevant data, develop and promote a vision for the school on the successful learning and development of each child and on instructional and organizational practices that promote such success.
(c) Articulate, advocate, and cultivate core values that define the school’s culture and stress the imperative of child-centered education; high expectations and student support; equity, inclusiveness, and social justice; openness, caring, and trust; and continuous improvement.
(d) Strategically develop, implement, and evaluate actions to achieve the vision for the school.

Standard 3. Equity and Cultural Responsiveness
Effective leaders:
(c) Ensure that each student has equitable access to effective teachers, learning opportunities, academic and social support, and other resources necessary for success.
(h) Address matters of equity and cultural responsiveness in all aspects of leadership.

Standard 5. Community of Care and Support For Students
Effective leaders:
(c) Provide coherent systems of academic and social supports, services, extracurricular activities, and accommodations to meet the range of learning needs of each student.

Standard 6. Professional Capacity of School Personnel
Effective leaders:
(a) Recruit, hire, support, develop, and retain effective and caring teachers and other professional staff and form them into an educationally effective faculty.
(b) Plan for and manage staff turnover and succession, providing opportunities for effective induction and mentoring of new personnel.
(i) Tend to their own learning and effectiveness through reflection, study, and improvement, maintaining a healthy work-life balance.

Standard 8. Meaningful Engagement of Families and Community
Effective leaders:
(h) Advocate for the school and district, and for the importance of education and student needs and priorities to families and the community.
(i) Advocate publicly for the needs and priorities of students, families, and the community.

Effective leaders:
a) Institute, manage, and monitor operations and administrative systems that promote the mission and vision of the school.
b) Strategically manage staff resources, assigning and scheduling teachers and staff to roles and responsibilities that optimize their professional capacity to address each student’s learning needs.
c) Seek, acquire, and manage fiscal, physical, and other resources to support curriculum, instruction, and assessment; student learning community; professional capacity and community; and family and community engagement.
d) Are responsible, ethical, and accountable stewards of the school’s monetary and non-monetary resources, engaging in effective budgeting and accounting practices.
e) Protect teachers’ and other staff members’ work and learning from disruption.
f) Employ technology to improve the quality and efficiency of operations and management.
g) Develop and maintain data and communication systems to deliver actionable information for classroom and school improvement.
h) Know, comply with, and help the school community understand local, state, and federal laws, rights, policies, and regulations so as to promote student success.

*Standard 10. School Improvement*

Effective leaders:

a) Seek to make school more effective for each student, teachers and staff, families, and the community.
b) Use methods of continuous improvement to achieve the vision, fulfill the mission, and promote the core values of the school.
c) Prepare the school and the community for improvement, promoting readiness, an imperative for improvement, instilling mutual commitment and accountability, and developing the knowledge, skills, and motivation to succeed in improvement.
d) Engage others in an ongoing process of evidence-based inquiry, learning, strategic goal setting, planning, implementation, and evaluation for continuous school and classroom improvement.
e) Employ situationally-appropriate strategies for improvement, including transformational and incremental, adaptive approaches and attention to different phases of implementation.
g) Develop technically appropriate systems of data collection, management, analysis, and use, connecting as needed to the district office and external partners for support in planning, implementation, monitoring, feedback, and evaluation.
h) Adopt a systems perspective and promote coherence among improvement efforts and all aspects of school organization, programs, and services.
i) Manage uncertainty, risk, competing initiatives, and politics of change with courage and perseverance, providing support and encouragement, and openly communicating the need for, process for, and outcomes of improvement efforts.