



HIED 659.01W Higher Education Finance

COURSE SYLLABUS: Spring 2018

January 16 – May 11

Instructor: Kimberly L. Laird, Ed.D., MBA, CPA

Office Location: Virtual

Office Hours: Virtual Daily

Phone: 214-649-7018

University Email Address: Kim.Laird@tamuc.edu

Skype Name: kllaird15

COURSE INFORMATION

Materials – Textbooks, Readings, Supplementary Readings

Textbooks Required:

Archibald, R. B., & Feldman, D. H. (2011). Why does college cost so much? New York, NY: Oxford Press. ISBN 978-0-199-74450-3 or 978-0-190-21410-4 (paperback version includes updated preface).

Barr, M. J., & McClellan, G. S. (2011). Budgets and financial management in higher education. San Francisco, CA: Jossey-Bass. ISBN 978-0-470-61620-8

Zumeta, W., Breneman, D. W., Callan, P. M., & Finney, J. E., (2012). Financing American higher education in the era of globalization. Cambridge, MA: Harvard Education Press. ISBN 978-1-61250-125-3

I will list additional required reading assignments in our eCollege classroom.

Current issues in higher education finance:

While we will be consulting relevant and important literature on higher education finance and budgeting during our course work, it is important that students learn to stay current within the dynamic landscape of higher education finance. Students are required to sign up for FREE daily updates to the following higher education resources:

Inside Higher Ed: <https://www.insidehighered.com/content/sign-inside-higher-eds-newsletters>

The Chronicle of Higher Education's Academe Today:
<http://chronicle.com/section/Newsletters/85>

Optional but strongly recommended:

American Psychological Association (2010). Publishing manual of the American Psychological Association (6th ed.). Washington, DC: Author

Course Description

This 3-semester hour course is an introductory examination of financial, economic, and budgetary issues within higher education. Focusing on not-for-profit postsecondary schools, students will review the primary political, economic, and social issues influencing higher education finance, examine revenue streams and expenditure patterns, survey tuition and financial aid policies, develop the ability to examine and analyze financial information, and assess the budget as an instrument of strategic planning, resource allocation, and control.

This course is grounded in literature, theories, and examples specific to higher education. My goal for this class is to provide students with the knowledge and abilities that empower them to make appropriate decisions as higher education leaders. Through assigned readings, lectures, and webcast materials, and by active course participation, including completion of assigned activities, students will have the opportunity to demonstrate their familiarity with the following topics:

Financing Higher Education

- Political influences
- Economic influences
- Social influences
- Complexities and challenges
- Statewide funding policies
- Emerging trends

Higher Education Revenue Sources and Uses

- State appropriations
- Tuition and fees
- Sponsored research
- Auxiliary enterprises
- Institutional fund raising
- Expenditure patterns

Institutional Budgeting and Planning

- Budget and financial terminology
- Resource allocation methods
- Budget cycle

Student Learning Outcomes

1. The learner will examine and become familiar with current policy issues in higher education finance.
2. The learner will develop an understanding of the influence internal and external stakeholders exert on higher education funding.
3. The learner will develop an understanding of the financial challenges currently facing higher education.
4. The learner will be able to describe how institutions of higher education are financed and the major revenue sources.
5. The learner will become familiar with locating and summarizing fiscal data for presentation to a general audience.
6. The learner will demonstrate the ability to read and interpret higher education budgets.
7. The learner will develop an understanding of the institutional budgeting process.
8. The learner will be able to describe the major models of internal resource allocation.
9. The learner will be able to conceptualize the relationship between higher education finance and other administrative functions such as strategic planning, student affairs, athletics, enrollment management, operation and maintenance of plant, and public and government relations.
10. The learner will identify and explore ways in which state fiscal and institutional budget decisions affect issues related to student demographics and access.
11. The learner will recognize, analyze, comprehend, and articulate, key higher education finance and institutional budgeting terms, trends, and concepts.
12. The learner will synthesize higher education finance and analyze how various economic, political, and social issues affect institutional funding and resource allocation.

COURSE REQUIREMENTS

Instructional / Methods / Activities Assessments

Students will be expected to:

1. Read assigned chapters from the textbooks and other assigned readings
2. Listen to lectures and view webcasts
3. Participate in ten weekly class discussions on assigned readings and current higher ed financing issues
4. Complete five quizzes on assigned readings
5. Complete a scholarly article review

6. Complete a state financing project
7. Complete an institutional financial analysis project
8. Complete an institutional budget project
9. Complete a research/analysis paper (8-10 pages)

Guidelines for Activities

Weekly Class Discussions (100 Maximum Points)

Our weekly discussions will serve as a forum for learning new material, keeping abreast of current higher education finance issues, applying learned concepts, presenting professional experience, and enhancing communication skills. Our discussion environment will emphasize quality rather than quantity. At a minimum, each student will be expected to provide one substantive original post to each question and one feedback post to peers. I will use the following rubric to evaluate student responses for each of the 10 total discussion questions required during the semester.

| Criteria | Exemplary Post | Satisfactory Post | Unsatisfactory Post |
|--|--|---|---|
| Contributes to the learning community (30%) | Illustrates awareness of the needs of the community; attempts to motivate the group discussion; presents creative approaches to topic | Attempts to direct the discussion and present relevant viewpoints for consideration by group; interacts freely | Does not make an effort to participate in learning community as it develops |
| Shows relevance to the assigned discussion topic (30%) | Includes content related to discussion topic; prompts further discussion of topic | Includes content related to the discussion topic | Includes content which does not relate to the discussion topic; makes short or irrelevant remarks |
| Includes examples and resources (25%) | Includes examples and/or quotes that support writer's point ("proves" it) and are properly integrated (not just dropped in) | Includes examples and/or quotes that support writer's point but are somewhat predictable or are not well integrated | Includes examples and/or quotes that do not effectively support writer's point; quotes or examples are poorly integrated or do not make sense as support |
| Demonstrates graduate level quality (15%) | Is appropriate, thoughtful, reflective, respectful of other's postings, clear, articulate and contains correct grammar and punctuation | Is appropriate and responds respectfully to other's postings; may contain minor grammar or punctuation errors that do not cloud meaning | Shows minimum effort (e.g. "I agree with Bill"); sloppy, uses text-messaging shortcuts; hard for readers to follow; fails to use correct grammar or punctuation |

Quizzes (100 Maximum Points)

Periodically, I will announce in advance a quiz over assigned readings or current articles in press (Chronicle of Higher Education or Inside HigherEd). There will be five (5) quizzes during the semester.

Contemporary Issue Article Review (175 Maximum Points)

Students will select an article or book chapter from the list of authorized course resources describing a contemporary higher education finance issue. Students will prepare a short (350-500 words, 12 pt. Times New Roman, 1" margins, double-spaced) abstract of the article. The APA-formatted graduate-level and original work will include: a summary identifying the key points of the article, an evaluation of the relevance of the subject matter to our study of higher education finance, personal reaction to the article's content, question(s) prompted by the material, and possible areas for future research. Students will post their abstract to our eCollege classroom and will have the opportunity to review and discuss the contemporary issues identified by colleagues. I will use the following rubric to evaluate the student's article abstract.

| Criteria | Exemplary Review | Satisfactory Review | Unsatisfactory Review |
|--|--|---|---|
| Key points summarized (20%) | Provides a very thorough, clear, and concise summary of the article context and content | Provides a clear but shallow summary of the article; may be excessively brief or may include some extraneous information | Provides an unclear/unintelligible summary of the article, or no summary at all |
| Relevance of the subject matter to HIED Finance is described (25%) | Article strongly relates to HIED Finance and connections are identified, supported, and communicated clearly | Article relates somewhat to HIED Finance and connections are identified, supported, and communicated clearly; or, article strongly relates to HIED Finance and connections are somewhat identified, supported, and communicated | Article does not relate to HIED Finance, no discussion provided, or discussion does not identify, support, or communicate connections |
| Student's personal reaction identified and described (20%) | Thoroughly describes student's personal reaction to the article; includes discussion of the relevant issues within the article | Describes student's personal reaction to the article; includes limited or no discussion of the relevant issues within the article | Provides an unclear, unintelligible or illogical description of student's personal reaction, or no description of personal reaction provided at all |
| Questions and areas for future research are identified (20%) | Raises questions evident of student's thorough understanding of article's content and context; proposes 1-3 areas for future research | Raises questions somewhat related to article's content and context; proposes 1 area for future research | Fails to raise questions related to article's content and context; fails to identify an area for future research |
| Graduate level quality is demonstrated (15%) | Consistently contains accurate and proper grammatical conventions, spelling, and punctuation; errors, if any, are minor. Clearly and consistently uses proper APA formatting | Contains some errors in grammatical conventions, spelling, and punctuation; errors begin to interfere with paper's meaning. Inconsistently uses APA formatting | Contains numerous errors in grammatical conventions, spelling, and punctuation; substantially interferes with paper's meaning |

State Financing Project (175 Maximum Points)

Students will gather and analyze data for a state and prepare a professional briefing memorandum. The memorandum should include an overview of the state context for financing higher education, trends in public higher education finance, institutional funding methodology, and critical issues influencing the financing of higher education within the state. Tables, charts, and graphs describing the key aspects of funding for higher education within the assigned state must support the content of the memorandum. I will provide additional details on this assignment within the eCollege classroom including links to online resources. Students are encouraged to seek out additional resources for this project.

Students will have an opportunity to share their professional briefing memorandum with the class. This will give us a chance to review information on the characteristics of higher education financing in multiple states. I will use the following assignment evaluation rubric.

| Criteria | Exemplary Memorandum | Satisfactory Memorandum | Unsatisfactory Memorandum |
|--|--|--|--|
| Required components included in memorandum. (25%) | The memorandum included all required components and met or exceeded the objectives of the assignment. | The memorandum included all required components and satisfactorily met the objectives of the assignment. | The memorandum omitted required components and only partially fulfilled the objectives of the assignment. |
| Valid, accurate, and appropriate data gathered and connection between claims and data evidenced. (25%) | Data are appropriate and very relevant; presentation and analysis of data are professional, thorough, engaging, and sophisticated. | Data are relevant; presentation and interpretation of results acceptable. | Data are not relevant for purpose; presentation and interpretation of results are inaccurate. |
| Use of time and initiative evidenced. (20%) | Time was used effectively, various ideas and concepts explored in depth, and a great deal of care and effort displayed in the memorandum. Care and thought evident. | Sufficient time invested to complete memorandum but with more effort, it could have been outstanding. | The memorandum was completed with a minimum of effort and care. Time could have been spent more effectively. |
| Coherent and organized response is presented. (15%) | Information is communicated toward professional audience. Professionals could make decisions and take appropriate action. | Memorandum is written appropriately for a professional audience. | Memorandum shows little or no evidence of audience awareness. Presentation would likely not prompt professionals to read it. |
| Appropriate language, professional style, and quality are presented. (15%) | Sentences contain no errors and are diverse and sophisticated. Style is concise and professional. The memorandum has clearly been edited and proofread numerous times. | Errors included in some sentences but they do not impede meaning. Style is generally concise and professional, but some additional editing is warranted. | Errors are so numerous in sentences that they impede meaning. Style is not concise or professional. |

Institutional Financial Analysis Project (175 Maximum Points)

Students will access publically available data from various sources, including institutional websites, state higher education databases, and IPEDS to analyze certain financial characteristics and metrics for a pair of institutions within the same higher education sector and within the same state for which the professional briefing memorandum was prepared. Students will prepare a comparative report and will have the opportunity to develop a basic understanding of the institutions by consulting their missions, gathering data on primary revenue and expense components, and calculating certain metrics and financial ratios. Students will compare and contrast the institutions and draw conclusions about their financial health and performance. The instructor will provide additional details on this assignment, including templates, within the eCollege classroom.

Students will have the opportunity to share their comparative report with the class. I will use the following assignment evaluation rubric.

| Criteria | Exemplary Comparative Report | Satisfactory Comparative Report | Unsatisfactory Comparative Report |
|---|---|--|--|
| Required components included in comparative report. (25%) | The report included all required components and met or exceeded the objectives of the assignment. | The report included all required components and satisfactorily met the objectives of the assignment. | The report omitted required components and only partially fulfilled the objectives of the assignment. |
| Valid, accurate, and appropriate data gathered, results correctly calculated, and connection between claims and data evidenced. (25%) | Data are appropriate and very relevant; presentation and analysis of data are professional, thorough, engaging, and sophisticated. | Data are relevant; presentation and interpretation of results acceptable. | Data are not relevant for purpose; presentation and interpretation of results are inaccurate. |
| Use of time and initiative evidenced. (20%) | Time was used effectively, various ideas and concepts explored in depth, and a great deal of care and effort displayed in the report. Care and thought evident. | Sufficient time invested to complete report but with more effort, it could have been outstanding. | The report was completed with a minimum of effort and care. Time could have been spent more effectively. |
| Coherent and organized response is presented; comparisons and contrasts made; conclusions drawn. (15%) | Information is communicated toward professional audience. Comparisons and contrasts are presented clearly; conclusions supported. Professionals could make decisions and take appropriate action. | Report is written appropriately for a professional audience. Comparisons, contrasts, and conclusions are presented. | Report shows little or no evidence of audience awareness. Comparisons, contrasts, and conclusions are lacking or not present. Presentation would likely not prompt professionals to read it. |
| Appropriate language, professional style, and quality are presented. (15%) | Sentences contain no errors and are diverse and sophisticated. Style is concise and professional. The report has clearly been edited and proofread numerous times. | Errors included in some sentences but they do not impede meaning. Style is generally concise and professional, but some additional editing is warranted. | Errors are so numerous in sentences that they impede meaning. Style is not concise or professional. |

Institutional Budget Project (175 Maximum Points)

Students will create a budget response to an institutional scenario provided by the instructor for one of the institutions analyzed in the Institutional Analysis project. Students will formulate recommendations on the appropriate budgetary action needed based on given scenario assumptions and prepare a one-page executive summary report (12 pt. Times New Roman, 1" margins, single-spaced) accompanied by an Excel spreadsheet supporting calculations. I will provide additional details on this assignment, including templates, within the eCollege classroom. The following evaluation rubric will be used.

| Criteria | Exemplary Executive Summary | Satisfactory Executive Summary | Unsatisfactory Executive Summary |
|--|--|--|---|
| Required components included in executive summary. (25%) | The executive summary included all required components and met or exceeded the objectives of the assignment. | The executive summary included all required components and satisfactorily met the objectives of the assignment. | The executive summary omitted required components and only partially fulfilled the objectives of the assignment. |
| Valid, accurate, and appropriate data gathered, results correctly analyzed; data and calculations support recommended courses of action. (25%) | Data are appropriate and very relevant; presentation and analysis of data are professional, thorough, engaging, and sophisticated. | Data are relevant; presentation and interpretation of results acceptable. | Data are not relevant for purpose; presentation and interpretation of results are inaccurate. |
| Use of time and initiative evidenced. (20%) | Time was used effectively, various ideas and concepts explored in depth, and a great deal of care and effort displayed in the executive summary. Care and thought evident. | Sufficient time invested to complete executive summary report but with more effort, it could have been outstanding. | The executive summary was completed with a minimum of effort and care. Time could have been spent more effectively. |
| Coherent and organized response is presented. Recommendations are included and supported. (15%) | Information is communicated toward professional audience. Recommendations are presented clearly and supported. Professionals could make decisions and take appropriate action. | Executive summary is written appropriately for a professional audience. Recommendations are presented. | Executive summary shows little or no evidence of audience awareness. Recommendations are lacking or are not present. Presentation would likely not prompt professionals to read it. |
| Appropriate language, professional style, and quality are presented. (15%) | Sentences contain no errors and are diverse and sophisticated. Style is concise and professional. The executive summary has clearly been edited and proofread numerous times. | Errors included in some sentences but they do not impede meaning. Style is generally concise and professional, but some additional editing is warranted. | Errors are so numerous in sentences that they impede meaning. Style is not concise or professional. |

Research/Analytical Paper and Briefing Presentation—Optional, however, this assignment is required in order to be eligible to receive an “A” grade (100 Maximum Points)

For students who chose to complete it, this assignment will allow students to expand development of their skills in gathering, analyzing, and synthesizing data and information by preparing a scholarly paper on an issue pertaining to higher education finance. Students should select an issue/topic that relates directly to one or more of learning outcomes 1-4, 8-10, and 12 as identified on page 3 of the syllabus. Let your own research/professional interests be your guide in selecting your topic. While I encourage doctoral students to select a topic that might further your scholarly research agenda, this paper must be original. **Students must not recycle work from another course.**

I encourage you to begin identifying possible topics and consulting multiple resources early to allow you sufficient time to refine the focus of your research. By **February 1, 2018**, you must complete and submit to the instructor a one-page overview of your topic, including your planned analytical approach and preliminary resources consulted. Students must receive the instructor’s written approval for the proposed topic and approach by **February 19, 2018**. **Students who have not received written instructor approval for their research topic by February 19, 2018 will not be eligible to receive an “A” grade.**

The paper may be a review of the literature or an analysis of a particular issue supported by scholarly research. The paper must identify the significance of the issue addressed, include a statement of the problem examined, summarize and synthesize supporting scholarly literature, and propose implications for policy, practice, and future research. The paper must comply with APA (6th ed.) guidelines, include 1” margins, double-spacing, Times New Roman 12-point type, and be of 8-10 pages in length (excluding cover, reference, and exhibit pages).

Students will also prepare a 5-minute presentation on the findings of their research using PowerPoint to include narration for a video-style presentation. The instructor will provide additional resources for the preparation of the briefing and specific instructions in the eCollege classroom. The following evaluation rubrics for the final paper and presentation will be used.

Research/Analytical Paper (7.5%) – Evaluation Rubric

| Criteria | Exemplary Paper | Satisfactory Paper | Unsatisfactory Paper |
|--|---|---|---|
| Introduction of the topic/problem (15%) | The topic or problem is introduced, and groundwork is laid as to the direction of the paper. | Readers are aware of the overall problem, challenge, or topic of the paper. | Neither implicit nor explicit reference is made to the topic or purpose of the paper. |
| Topic Focus (15%) | The topic is focused narrowly enough for the scope of this assignment. A thesis statement provides direction for the paper, either by statement of a position or hypothesis. | The topic is focused but lacks direction. The paper is about a specific topic but the writer has not established a position. | The topic is not clearly defined. |
| Integration of Knowledge (20%) | The paper demonstrates that the author fully understands and has applied concepts learned in the course. Concepts are integrated into the writer's own insights. | The paper demonstrates that the author, for the most part, understands and has applied concepts learned in the course. | The paper does not demonstrate that the author has fully understood and applied concepts learned in the course. |
| Organization & Cohesion (15%) | The paper ties together information from all sources. Paper flows from one issue to the next with appropriate transitions. Author's writing demonstrates an understanding of the relationship among material obtained from all sources. | For the most part, the paper ties together information from all sources. Paper flows with only some disjointedness. Author's writing demonstrates an understanding of the relationship among material obtained from all sources. | The paper does not tie together information. Paper does not flow and appears to be created from disparate issues. Concepts are not linked clearly. Writing does not demonstrate understanding of relationships |
| Synthesis and Conclusion; Presentation of Implications for Policy, Practice, & Future Research (15%) | The writer provides concluding remarks that show analysis and synthesis of ideas based on the literature and findings. Insights into the problem are appropriate. Implications for policy and practice as well as possible areas for future research presented. | The author provides concluding remarks that show an analysis and synthesis of ideas occurred. Implications for policy and practice as well as possible areas for future research presented. Some of the conclusions, implications, or future research areas however, were not supported in the body of the paper. | There is little to no indication the author tried to synthesize the information or make a conclusion based on the literature under review. Conclusions, implications, or future research areas are incomplete, unsupported, or missing. |
| Style: Sentence Structure, Spelling, Grammar & Punctuation (5%) | Minor, if any, spelling and/or grammar mistakes. | Some spelling and/or grammar mistakes present but they do not impede meaning. | Numerous spelling and/or grammar mistakes to the point where meaning is impeded. |
| Sources (10%) | Sources, both general background and specialized, include a majority of peer-reviewed journal articles and scholarly books (many current). | Sources, both general background and specialized, include some peer-reviewed journal articles and scholarly books (some current). Special- | Sources, both general background and specialized, do not include peer-reviewed journal articles and scholarly book (many not current). Special- |

| Criteria | Exemplary Paper | Satisfactory Paper | Unsatisfactory Paper |
|-----------------|---|---|--|
| | Special-interest sources and popular literature are acknowledged as such if they are cited. All web sites utilized are authoritative. | interest sources and popular literature are acknowledged as such if they are cited. All web sites utilized are authoritative. | interest sources and popular literature are not acknowledged as such if they are cited. Not all web sites utilized are credible. |
| Citations (5%) | Cites all data obtained from other sources. APA citation style is used in both text and bibliography. | Cites most data obtained from other sources. APA citation style is used in both text and bibliography. | Cites some data obtained from other sources. Citation style is either inconsistent or incorrect. |

Research/Analytical Briefing (2.5%) – Evaluation Rubric

| Criteria | Exemplary Presentation | Satisfactory Presentation | Unsatisfactory Presentation |
|--|---|---|--|
| Organization (20%) | Presentation introduces the topic clearly and creatively, maintaining clear focus on the topic and effectively includes smooth transitions to connect key points. Presentation ends with logical, effective, and relevant conclusion. | Presentation introduces the topic clearly, maintains focus on the topic, and includes transitions to connect key points. It ends with coherent conclusion based on evidence. | Presentation does not introduce the topic clearly and fails to maintain focus on the topic. Transitions are missing or do not connect key points. Conclusion is absent, incoherent, or unsupported. |
| Topic Introduction & Support (15%) | Background information is interesting and timely, research question(s) is(are) clearly stated and linked to theory/literature presented. | Background information is moderately interesting, research question(s) is(are) presented but not strongly linked to theory/literature. | Background information is not germane, or is uninteresting; no link between the research question(s) and theory/literature presented. |
| Relevant Literature Summarized (15%) | Presentation makes clear the theories, concepts and key ideas within the discipline. | Presentation addresses theory and concepts but not always in a clear, concise manner. Key ideas within the discipline are included. | Presentation indicates a clear lack of understanding of the theory and concepts discussed. There is no reference to the key ideas within the discipline. |
| Appropriate Level of Detail for Findings (15%) | Results are clearly presented and explained. Data are interpreted objectively demonstrating a thorough understanding of the issues. | Results are presented and explained but not always in a clear and concise manner. Data interpretation is sometimes influenced by personal opinion. The context of the issues is not thoroughly addressed. | Not all results are presented. The quality of the explanation demonstrates a lack of understanding or comprehension. Data interpretation is not objective or supported by the evidence. The context of the issue is ignored. |
| Support for Conclusions (15%) | All relevant findings are summarized. Policy and practice implications as well as areas for future research are discussed thoroughly and supported. | Most relevant findings are summarized. The policy and practice implications are discussed but not thoroughly. Areas for future research are mentioned but not supported. | Relevant findings are not summarized. There is a superficial or nonexistent discussion of practice and policy implications. Areas for future research are superficially addressed or completely ignored. |
| Preparation & Enthusiasm (10%) | Presenter is well prepared, relaxed, | Presenter is generally prepared, relaxed, and | The speaker appears ill prepared, |

| Criteria | Exemplary Presentation | Satisfactory Presentation | Unsatisfactory Presentation |
|--|--|--|--|
| | comfortable speaks with enthusiasm/ passion for work, and maintains a quick pace while covering material thoroughly in allowed time. | comfortable, but tone lacks enthusiasm/passion for work, and pace lags or drags; material may not be covered thoroughly in allowed time. | uncomfortable, uninterested in work; speaks in a monotone, fails to cover material adequately in allowed time. |
| Style, Sentence Structure, Spelling, Grammar & Punctuation (10%) | Minimal number of minor grammar/mechanical mistakes. Slides are organized logically. They are easy to read. Graphics are included and appropriate. | Fair number of minor grammar/mechanical mistakes. Slides are fairly well organized and are generally easy to read. Some graphics are included and are appropriate. | Serious grammar and/or mechanical mistakes. Slides are poorly organized and are difficult to read. Graphics are not included or are inappropriate. |

ASSIGNMENT GRADING

| Assignments | Available Points | % of Total Grade – “A” Track | % of Total Grade – “B” Track |
|--|-------------------------|-------------------------------------|-------------------------------------|
| Quizzes (5) | 100 | 10.00% | 11.11% |
| Weekly Discussions (10) | 100 | 10.00% | 11.11% |
| Contemporary Issue Article Review | 175 | 17.50% | 19.44% |
| State Financing Project | 175 | 17.50% | 19.44% |
| Institutional Financial Analysis Project | 175 | 17.50% | 19.44% |
| Budget Project | 175 | 17.50% | 19.44% |
| Total | 900 | 90.00% | 100.00% |
| Additional Assignments Required for an “A” | | | |
| Research/Analytical Paper | 75 | 7.50% | |
| Research/Analytical Presentation | 25 | 2.50% | |
| Total | 1,000 | 100.00% | |

GRADING SCALE

| Total Points | Letter Grade* |
|---------------------|----------------------|
| 900 - 1,000 | A |
| 800 - 899 | B |
| 700 - 799 | C |
| 600 - 699 | D |
| 0 - 599 | F |

* Note: A grade of B or above is required for credit toward a doctoral degree
Late work – as the syllabus indicates, we have much material to cover during our time together this semester. In order to maintain a steady momentum for our learning journey, we must stay on schedule. **All work is due on the assigned date. I will drop the grade one full letter grade for each day an assignment is late up to three days beyond the due date, unless prior approval has been obtained. If the assignment has not been turned in within three days from the original due date, a grade of zero will be entered into the gradebook for the assignment.** Please consult your syllabus routinely and plan your work accordingly.

Disclaimer – the instructor reserves the right to modify this syllabus as necessary. The instructor will notify students of amendments to the syllabus via our eCollege classroom. It is the student’s responsibility to stay up to date and remain aware of any changes.

TECHNOLOGY REQUIREMENTS

- To fully participate in online courses, you will need to use a current, Flash enabled browser. For PC users, the suggested browser is Internet Explorer 9.0 or 10. For Mac users, the most current update of Firefox is suggested.
- You will need regular access to a computer with a broadband Internet connection. The minimum computer requirements are:
 - 512 MB of RAM, 1 GB or more preferred
 - Broadband connection required courses are heavily video intensive
 - Video display capable of high-color 16-bit display 1024 x 768 or higher resolution
- You must have a:
 - sound card, which is usually integrated into your desktop or laptop computer
 - speakers or headphones.
- Depending on your course, you might also need a:
 - webcam
 - microphone

For courses where interactive tools are used, like VoiceThread or ClassLive Pro, headphones are suggested for use with recording and playback. We recommend a webcam with an integrated microphone, such as the Microsoft LifeCam Cinema. All devices should be installed and configured before class begins.

- Both versions of Java (32 bit and 64 bit) must be installed and up to date on your machine. Java can be downloaded at: <http://www.java.com/en/download/manual.jsp>
- Current anti-virus software must be installed and kept up to date.
- You will need some additional free software for enhanced web browsing. Ensure that you download the free versions of the following software:
 - Adobe Reader
 - Adobe Flash Player
 - Jing
- At a minimum, you must have Microsoft Office 2013, 2010, 2007 or Open Office. Microsoft Office is the standard office productivity software utilized by faculty, students, and staff. Microsoft Word is the standard word processing software, Microsoft Excel is the standard spreadsheet software, and Microsoft PowerPoint is the standard presentation software. Copying and pasting, along with attaching/uploading documents for assignment submission, will also be required. If you do not have Microsoft Office, you can check with the bookstore to see if they have any student copies.
- For additional information about system requirements, please see: <https://secure.ecollege.com/tamuc/index.learn?action=technical>

ACCESS AND NAVIGATION

Pearson LearningStudio (eCollege) Access and Log in Information

This course will be facilitated using Pearson LearningStudio, the learning management system used by Texas A&M University-Commerce. To get started with the course, go to: <http://www.tamuc.edu/myleo.aspx>.

You will need your CWID and password to log in to the course. If you do not know your CWID or have forgotten your password, contact Technology Services at 903.468.6000 or helpdesk@tamuc.edu.

It is strongly recommended that you perform a "Browser Test" prior to the start of your course. To launch a browser test, login to Pearson LearningStudio, click on the 'myCourses' tab, and then select the "Browser Test" link under Support Services.

Pearson LearningStudio Student Technical Support

Texas A&M University-Commerce provides students technical support in the use of Pearson LearningStudio.

Technical assistance is available 24 hours a day/ 7 days a week.

If at any time you experience technical problems (e.g., you can't log in to the course, you can't see certain material, etc.) please contact the Pearson LearningStudio Help Desk, available 24 hours a day, seven days a week.

The student help desk may be reached by the following means 24 hours a day, seven days a week.

- **Chat Support:** Click on '*Live Support*' on the tool bar within your course to chat with a Pearson LearningStudio Representative.
- **Phone:** 1-866-656-5511 (Toll Free) to speak with Pearson LearningStudio Technical Support Representative.
- **Email:** helpdesk@online.tamuc.org to initiate a support request with Pearson LearningStudio Technical Support Representative.

Accessing Help from within Your Course: Click on the '*Tech Support*' icon on the upper left side of the screen inside the course. You will then be able to get assistance via online chat, email or by phone by calling the Help Desk number noted below.

Note: Personal computer problems do not excuse the requirement to complete all course work in a timely and satisfactory manner. Each student needs to have a backup method to deal with these inevitable problems. These methods might include the availability of a backup PC at home or work, the temporary use of a computer at a friend's home, the local library, office service companies, an Internet cafe, or a bookstore, such as Barnes & Noble, etc.

Policy for Reporting Problems with Pearson LearningStudio

Should students encounter Pearson LearningStudio based problems while submitting assignments/discussions/comments/exams, the following procedures **MUST** be followed.

1. Students must report the problem to the help desk. You may reach the helpdesk at helpdesk@online.tamuc.org or 1-866-656-5511
2. Students **MUST** file their problem with the helpdesk and obtain a helpdesk ticket number

3. Once a helpdesk ticket number is in your possession, students should email me to advise me of the problem and to provide me with the helpdesk ticket number
4. At that time, I will call the helpdesk to confirm your problem and follow up with you

PLEASE NOTE: Your personal computer/access problems are not a legitimate excuse for filing a ticket with the Pearson LearningStudio Help Desk. You are strongly encouraged to check for compatibility of your browser **BEFORE** the course begins and to take the Pearson LearningStudio tutorial offered for students who may require some extra assistance in navigating the Pearson LearningStudio platform. **ONLY** Pearson LearningStudio based problems are legitimate.

Internet Access

An Internet connection is necessary to participate in discussions and assignments, access readings, transfer course work, and receive feedback from your professor. View the requirements as outlined in Technology Requirements above for more information.

myLeo Support

Your myLeo email address is required to send and receive all student correspondence. Please email helpdesk@tamuc.edu or call us at 903-468-6000 with any questions about setting up your myLeo email account. You may also access information at <https://leo.tamuc.edu>.

Learner Support

Go to the following link [One Stop Shop](#)- created to serve you by attempting to provide as many resources as possible in one location.

Go to the following link [Academic Success Center](#)- focused on providing academic resources to help you achieve academic success.

COMMUNICATION AND SUPPORT

Your success in this class is dependent on our ability to communicate clearly as well as your understanding of the material and your responsibilities in completing the assignments. I encourage questions. You may contact me online through our eCollege classroom or via University email Kim.Laird@tamuc.edu. I check in everyday and I will respond to your inquiry within 48 hours.

COURSE AND UNIVERSITY PROCEDURES/POLICIES

University Specific Procedures

ADA Statement

Students with Disabilities

The Americans with Disabilities Act (ADA) is a federal anti-discrimination statute that provides comprehensive civil rights protection for persons with disabilities. Among other things, this legislation requires that all students with disabilities be guaranteed a learning environment that provides for reasonable accommodation of their disabilities. If you have a disability requiring an accommodation, please contact:

Office of Student Disability Resources and Services

Texas A&M University-Commerce
Gee Library- Room 132
Phone (903) 886-5150 or (903) 886-5835
Fax (903) 468-8148
StudentDisabilityServices@tamuc.edu

Concealed Carry

Texas Senate Bill - 11 (Government Code 411.2031, et al.) authorizes the carrying of a concealed handgun in Texas A&M University-Commerce buildings only by persons who have been issued and are in possession of a Texas License to Carry a Handgun. Qualified law enforcement officers or those who are otherwise authorized to carry a concealed handgun in the State of Texas are also permitted to do so. Pursuant to Penal Code (PC) 46.035 and A&M-Commerce Rule 34.06.02.R1, license holders may not carry a concealed handgun in restricted locations.

For a list of locations, please refer to the [Carrying Concealed Handguns on Campus](#) document and/or consult your event organizer.

Web url:

<http://www.tamuc.edu/aboutUs/policiesProceduresStandardsStatements/rulesProcedures/34SafetyOfEmployeesAndStudents/34.06.02.R1.pdf>

Pursuant to PC 46.035, the open carrying of handguns is prohibited on all A&M-Commerce campuses. Report violations to the University Police Department at 903-886-5868 or 9-1-1.

Student Conduct

All students enrolled at the University shall follow the tenets of common decency and acceptable behavior conducive to a positive learning environment. (See *Code of Student Conduct from Student Guide Handbook*). Students should also consult the Rules of Netiquette for more information regarding how to interact with students in an online forum: <http://www.albion.com/netiquette/corerules.html>

Texas A&M University-Commerce will comply in the classroom, and in online courses, with all federal and state laws prohibiting discrimination and related retaliation on the basis of race, color, religion, sex, national origin, disability, age, genetic information or veteran status. Further, an environment free from discrimination on the basis of sexual orientation, gender identity, or gender expression will be maintained.

COURSE OUTLINE

So that students will be working with the most recent higher education finance information available, this outline is subject to change. Students will be notified in the eCollege Classroom of any and all changes and are responsible for the content and assignments included in the eCollege Classroom.

**AF = Archibald & Feldman Text
Z = Zumeta, et al. Text**

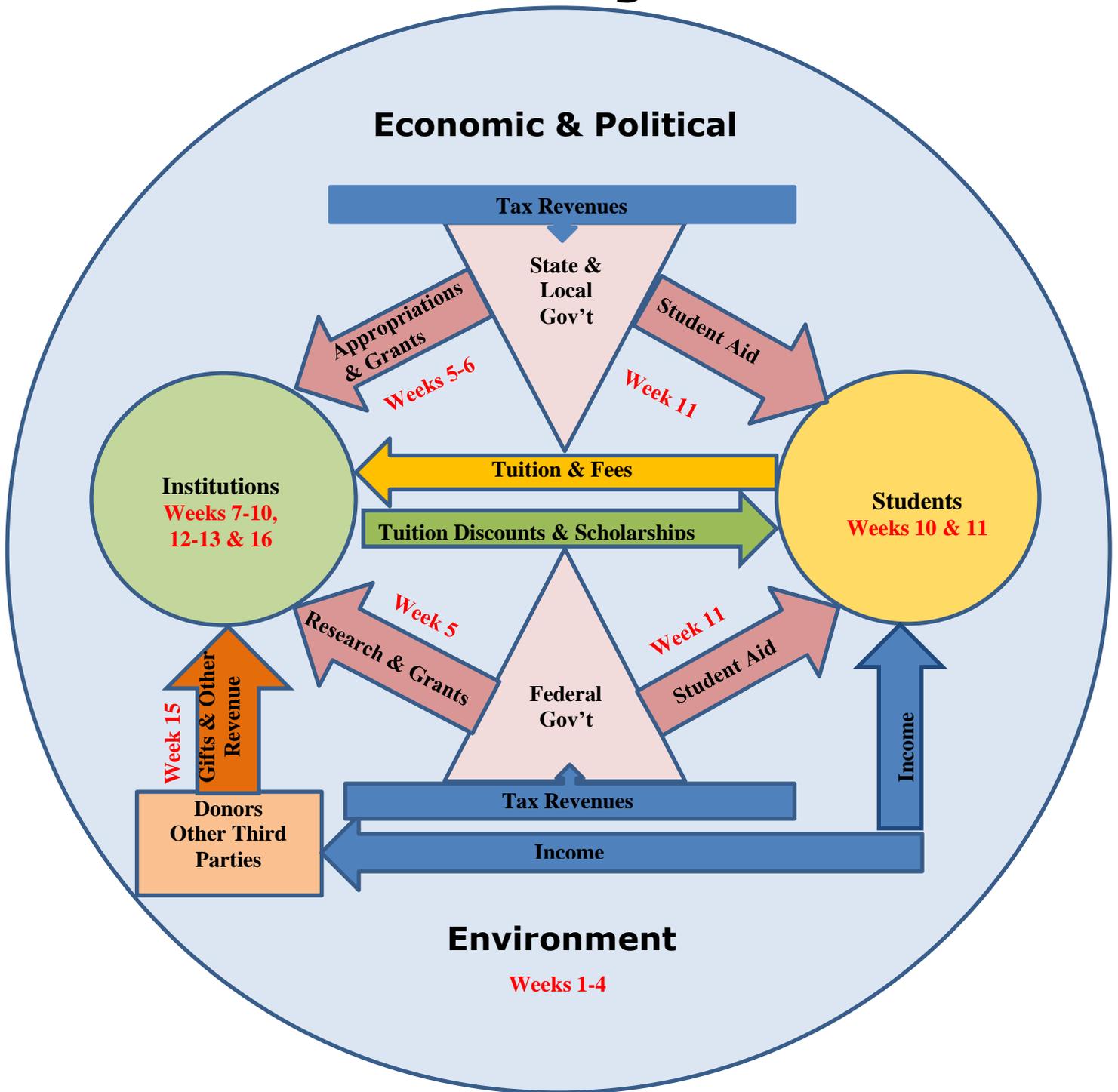
**BM = Barr & McClellan Text
SR = Supplementary Readings (as assigned--see Supplementary reading List and weekly assignments)**

| Week | Date | Topic | Action |
|-------------|-------------|---|---|
| 1 | January 16 | Introduction <ul style="list-style-type: none"> • Course Objectives & Expectations • Class introductions • Important Concepts in the Study of Economics, Finance. and Budgeting • Sign up for free HIED newsletters | Read: SR DQ 1 |
| 2 | January 22 | History of Higher Education Funding | Read: AF Chs 1 & 2 Z Chs 1 & 3 SR DQ 2 Quiz 1 |
| 3 | January 29 | Contemporary Issues in Higher Education Funding | Read: Z Ch 4 SR DQ 3 Due: Research paper overview |

| Week | Date | Topic | Action |
|-------------|-------------|--|--|
| 4 | February 5 | Investing in Higher Education-a Public or Private Good? | Read: AF Ch 3, 4 & 15 SR DQ 4 Due: Contemporary article review |
| 5 | February 12 | The State & Federal Role in Higher Ed Financing – Policy | Read: AF Chs 13, 15 & 16 Z Ch 5 SR DQ 5 |
| 6 | February 19 | State Funding Methodologies | Read: SR Quiz 2 |
| 7 | February 26 | Higher Education as a Financial Organization – Understanding fund accounting & financial data analysis | Read: SR DQ 6 Due: State financing project |
| 8 | March 5 | Higher Education as a Financial Organization – Sources and uses of funds | Read: AF Chs 5 & 6 Z Ch 6 BM Chs 1 & 2 SR Quiz 3 |
| 9 | March 12 | Spring Break | No Assignments |
| 10 | March 19 | Tuition policies | Read: AF Chs 9, 10 & 12 SR DQ 7 |

| Week | Date | Topic | Action |
|-------------|-------------|--|---|
| 11 | March 26 | Financial Aid Policies | Read: AF Chs 11 & 14 BM Chs 1-2 SR Quiz 4 Due: Institutional finance analysis project |
| 12 | April 2 | Institutional Planning & Budgeting – Basic budget concepts | Read: BM Chs 3-4 SR DQ 8 |
| 13 | April 9 | Institutional Planning & Budgeting – Capital budgeting, debt service, and strategic planning | Read: BM Chs 5-7 Z Ch 7 SR Quiz 5 |
| 14 | April 16 | Work on final paper | Due: Institutional Budget Project |
| 15 | April 23 | Auxiliary Enterprises, Athletics, Fund Raising, Endowments, and Other Sources/Uses | Read: SR DQ 9 Due: Research Paper |
| 16 | April 30 | Efficiency and Productivity | Read: AF Chs 7, 6, & 16 SR Due: Research Paper Presentation |
| 17 | May 7 | Review and discuss student research | DQ 10 |

HIED Finance Interrelationships and Course Organization



Adapted from diagram published by the National Center for Higher Education Management Systems:
<http://www.higheredinfo.org/catcontent/cat8.php>