



HIED 659.01W Higher Education Finance

COURSE SYLLABUS: Spring 2020

January 30 – May 8

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

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Office Hours: Virtual Daily

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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. (2018). Budgets and financial management in higher education, 3rd edition. San Francisco, CA: Jossey-Bass. ISBN 978-1-119-28773-5

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 myLeo Online Learning 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, optional)

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

Criteria	Exemplary Post	Satisfactory Post	Unsatisfactory Post
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 myLeo Online Learning 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	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

Criteria	Exemplary Review	Satisfactory Review	Unsatisfactory Review
	the article		
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 myLeo Online Learning 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	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.

Criteria	Exemplary Memorandum	Satisfactory Memorandum	Unsatisfactory Memorandum
	memorandum. Care and thought evident.		
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 publicly available data from various sources, including institutional websites, state higher education databases, and the Integrated Postsecondary Education Data System (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 after having had 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 myLeo Online Learning 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.

Criteria	Exemplary Comparative Report	Satisfactory Comparative Report	Unsatisfactory Comparative Report
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 myLeo Online Learning 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	Sufficient time invested to complete executive summary report but with more effort, it	The executive summary was completed with a minimum of effort and care. Time could have

Criteria	Exemplary Executive Summary	Satisfactory Executive Summary	Unsatisfactory Executive Summary
	great deal of care and effort displayed in the executive summary. Care and thought evident.	could have been outstanding.	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 16, 2020**, 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 16, 2020. Students who have not received written instructor approval for their research topic by March 1, 2020 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 myLeo Online Learning 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

Criteria	Exemplary Paper	Satisfactory Paper	Unsatisfactory Paper
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 are 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). Special-interest sources and popular literature are acknowledged as such if they are cited. All web sites utilized are authoritative.	Sources, both general background and specialized, include some peer-reviewed journal articles and scholarly books (some current). Special-interest sources and popular literature are acknowledged as such if they are cited. All web sites utilized are authoritative.	Sources, both general background and specialized, do not include peer-reviewed journal articles and scholarly book (many not current). Special-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.

Criteria	Exemplary Presentation	Satisfactory Presentation	Unsatisfactory Presentation
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, comfortable speaks with enthusiasm/ passion for work, and maintains a quick pace while covering material thoroughly in allowed time.	Presenter is generally prepared, relaxed, and comfortable, but tone lacks enthusiasm/passion for work, and pace lags or drags; material may not be covered thoroughly in allowed time.	The speaker appears ill prepared, 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 Finance 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 myLeo Online Learning Classroom. It is the student’s responsibility to stay up to date and remain aware of any changes.

TECHNOLOGY REQUIREMENTS

LMS

All course sections offered by Texas A&M University-Commerce have a corresponding course shell in the myLeo Online Learning Management System (LMS). Below are technical requirements

Browser support

D2L is committed to performing key application testing when new browser versions are released. New and updated functionality is also tested against the latest version of supported browsers. However, due to the frequency of some browser releases, D2L cannot guarantee that each browser version will perform as expected. If you encounter any issues with any of the browser versions listed in the tables below, contact D2L Support, who will determine the best course of action for resolution. Reported issues are prioritized by supported browsers and then maintenance browsers.

Supported browsers are the latest or most recent browser versions that are tested against new versions of D2L products. Customers can report problems and receive support for issues. For an optimal experience, D2L recommends using supported browsers with D2L products.

Maintenance browsers are older browser versions that are not tested extensively against new versions of D2L products. Customers can still report problems and receive support for critical issues; however, D2L does not guarantee all issues will be addressed. A maintenance browser becomes officially unsupported after one year.

Desktop Support

Browser	Supported Browser Version(s)	Maintenance Browser Version(s)
Microsoft® Edge	Latest	N/A
Microsoft® Internet Explorer®	N/A	11
Mozilla® Firefox®	ESR - latest version (including a 12-week overlap with the previous version)	N/A
Google® Chrome™	Latest	N/A

Browser	Supported Browser Version(s)	Maintenance Browser Version(s)
Apple® Safari®	Latest	N/A

Tablet and Mobile Support

Device	Operating System	Browser	Supported Browser Version(s)
Android™	Android 5.0 +	Chrome	Latest
Apple	iOS®	Safari, Chrome	The current major version of iOS (the latest minor or point release of that major version) and the previous major version of iOS (the latest minor or point release of that major version). For example, as of June 7, 2017, D2L supports iOS 10.3.2 and iOS 9.3.5, but not iOS 10.2.1, 9.0.2, or any other version. Chrome: Latest version for the iOS browser.
Windows	Windows 10	Edge, Chrome, Firefox	Latest of all browsers, and Firefox ESR.

Note the following:

- Ensure that your browser has JavaScript and Cookies enabled.
- For desktop systems, you must have Adobe Flash Player 10.1 or greater.
- The Brightspace Support features are now optimized for production environments when using the Google Chrome browser, Apple Safari browser, Microsoft Edge browser, Microsoft Internet Explorer browser, and Mozilla Firefox browsers.

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.
 - *For courses utilizing video-conferencing tools and/or an online proctoring solution, a webcam and microphone are required.
- Both versions of Java (32 bit and 64 bit) must be installed and up to date on your machine. At a minimum Java 7, update 51, is required to support the learning management system. The most current version of Java can be downloaded at: JAVA web site
<http://www.java.com/en/download/manual.jsp>
 - Current anti-virus software must be installed and kept up to date.
 - Running the browser check will ensure your internet browser is supported.
 - Pop-ups are allowed.
 - JavaScript is enabled.
 - Cookies are enabled.
 - You will need some additional free software (plug-ins) for enhanced web browsing. Ensure that you download the free versions of the following software:
 - Adobe Reader <https://get.adobe.com/reader/>
 - Adobe Flash Player (*version 17 or later*)
<https://get.adobe.com/flashplayer/>
 - Adobe Shockwave Player <https://get.adobe.com/shockwave/>
 - Apple Quick Time <http://www.apple.com/quicktime/download/>
 - 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.

YouSeeU Virtual Classroom Requirements:

<https://support.youseeu.com/hc/en-us/articles/115007031107-Basic-System-Requirements>

ACCESS AND NAVIGATION

You will need your campus-wide ID (CWID) and password to log into the course. If you do not know your CWID or have forgotten your password, contact the Center for IT Excellence (CITE) at 903.468.6000 or helpdesk@tamuc.edu.

Note: Personal computer and internet connection 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, Starbucks, a TAMUC campus open computer lab, etc.

COMMUNICATION AND SUPPORT

If you have any questions or are having difficulties with the course material, please contact your Instructor.

Technical Support

If you are having technical difficulty with any part of myLeo Online Learning Classroom, please contact myLeo Online Learning Classroom Technical Support at 1-877-325-7778. Other support options can be found here:

<https://community.brightspace.com/support/s/contactsupport>

System Maintenance

A&M-Commerce System Maintenance is generally scheduled for the fourth Saturday evening of every month. During this maintenance window, from 6:00 pm Saturday through 9:00 am (CST) Sunday, the system will not be available.

Interaction with Instructor Statement

This is an online course. You must regularly log in to our myLeo Online Classroom and review your myLeo email account. Although I will reply to emails from non-university email accounts, I will only send original messages to myLeo email accounts.

I check my email daily and it is the best way to reach me. I will respond generally within 48 hours, depending upon the time your message was received.

COURSE AND UNIVERSITY PROCEDURES/POLICIES

University Specific Procedures

Student Conduct

All students enrolled at the University shall follow the tenets of common decency and acceptable behavior conducive to a positive learning environment. The Code of Student Conduct is described in detail in the [Student Guidebook](#).

<http://www.tamuc.edu/Admissions/oneStopShop/undergraduateAdmissions/studentGuidebook.aspx>

Students should also consult the Rules of Netiquette for more information regarding how to interact with students in an online forum:

<https://www.britannica.com/topic/netiquette>

TAMUC Attendance

For more information about the attendance policy please visit the [Attendance](#) webpage and [Procedure 13.99.99.R0.01](#).

<http://www.tamuc.edu/admissions/registrar/generalInformation/attendance.aspx>

<http://www.tamuc.edu/aboutUs/policiesProceduresStandardsStatements/rulesProcedures/13students/academic/13.99.99.R0.01.pdf>

Academic Integrity

Students at Texas A&M University-Commerce are expected to maintain high standards of integrity and honesty in all of their scholastic work. For more details and the definition of academic dishonesty see the following procedures:

[Undergraduate Academic Dishonesty 13.99.99.R0.03](#)

<http://www.tamuc.edu/aboutUs/policiesProceduresStandardsStatements/rulesProcedures/13students/undergraduates/13.99.99.R0.03UndergraduateAcademicDishonesty.pdf>

[Graduate Student Academic Dishonesty 13.99.99.R0.10](#)

<http://www.tamuc.edu/aboutUs/policiesProceduresStandardsStatements/rulesProcedures/13students/graduate/13.99.99.R0.10GraduateStudentAcademicDishonesty.pdf>

Students with Disabilities-- ADA Statement

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 162

Phone (903) 886-5150 or (903) 886-5835

Fax (903) 468-8148

Email: studentdisabilityservices@tamuc.edu

Website: [Office of Student Disability Resources and Services](#)

<http://www.tamuc.edu/campusLife/campusServices/studentDisabilityResourcesAndServices/>

Nondiscrimination Notice

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.

Campus Concealed Carry Statement

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.

Syllabus Change Policy

The syllabus is a guide. Circumstances and events, such as student progress, may make it necessary for the instructor to modify the syllabus during the semester. Any changes made to the syllabus will be announced in advance.

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 myLeo Online Learning Classroom of any and all changes and are responsible for the content and assignments included in the myLeo Online Learning Classroom.

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

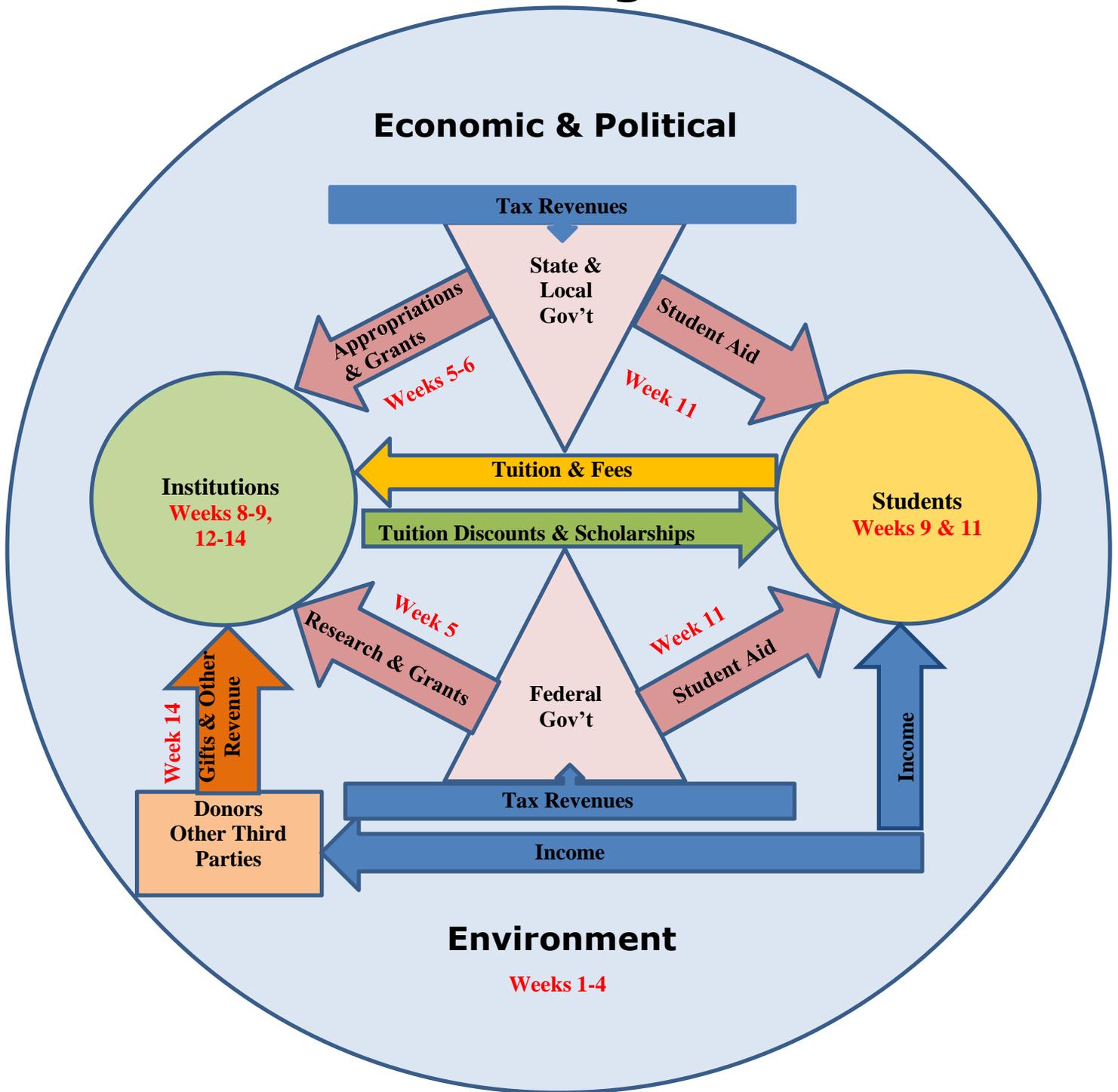
BM = Barr & McClellan Text
SR = Supplementary Readings (as assigned--see Supplementary reading List and weekly assignments)

Week	Start Date	Topic	Action
1 & 2	January 30	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 History of Higher Education Funding	Read: SR DQ 1 Pre-Course Survey Read: AF Chs 1 & 2 Z Chs 1 & 3 SR DQ 2 Quiz 1
3	February 10	Contemporary Issues in Higher Education Funding	Read: Z Ch 4 SR DQ 3 Due: Research Paper Overview

Week	Start Date	Topic	Action
4	February 17	Investing in Higher Education-a Public or Private Good?	Read: AF Ch 3, 4 & 15 SR DQ 4
5	February 24	The State & Federal Role in Higher Ed Financing – Policy	Read: AF Chs 13, 15 & 16 Z Ch 5 SR Due: Contemporary article review
6	March 2	State Funding Methodologies	Read: SR DQ 5 Quiz 2
7	March 9	Spring Break	No Assignments
8	March 16	Higher Education as a Financial Organization – Understanding fund accounting & financial data analysis	Read: SR DQ 6
9	March 23	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 Due: State Financing Project
10	March 30	Tuition policies	Read: AF Chs 9, 10 & 12 SR DQ 7

Week	Start Date	Topic	Action
11	April 6	Financial Aid Policies	Read: AF Chs 11 & 14 BM Chs 1-2 SR Quiz 4
12	April 13	Institutional Planning & Budgeting – Basic budget concepts	Read: BM Chs 3-4 SR Due: Institutional Finance Analysis Project
13	April 20	Institutional Planning & Budgeting – Capital budgeting, debt service, and strategic planning	Read: BM Chs 5-7 Z Ch 7 SR DQ 8 Quiz 5 Due: Optional (“A” Track) Research Paper & Presentation
14	April 27	Auxiliary Enterprises, Athletics, Fund Raising, Endowments, and Other Sources/Uses	Read: SR Due: Institutional Budget Project
15	May 4	Review and Discuss Student Research	DQ 9 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>