



DEPARTMENT OF EDUCATIONAL LEADERSHIP, COLLEGE OF EDUCATION

About the Course

This course is designed to provide a comprehensive overview of higher education funding and financing. Specific details of how a budget is built, sources of revenue, objects of expenditures, and planning are covered in the course. Students will learn relevant terms, how to plan, build and implement an institution-wide budget. It is intended to prepare students for leadership positions in higher education by providing a better understanding of financial, budgetary, and planning issues in public post-secondary education. Credit 3.

Learning Outcomes

At the end of this course, students will be able to:

- Describe revenue sources and common expenditures for higher education institutions
- Understand the relationship between higher education policy and finance
- Analyze concepts, research, practices, trends, and issues impacting higher education finance
- Create strategic initiatives to respond to resource needs in higher education

IDEA Objectives

In this course, the focus will be on these major objectives (as assessed by the IDEA course evaluation system):

Essential: Learning to apply course material;
Learning to analyze critically.

Important: Learning fundamental principles, generalizations, and theories.

Class Meeting Time & Locations

Tuesdays, 7:20-9:50pm
The Woodlands Center, Room 255

In addition to face-to-face meetings, this course will also require some work online using available technological tools.

To meet the goals and objectives of this course, instruction consists of a minimum of 4 hours per week (40 hours total). Instruction is comprised of 2.5 clock hours in class and at least 2-3 hours per week outside of class of field-based activities.

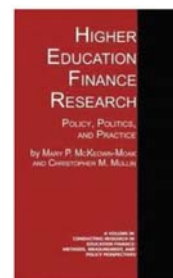
HIED 7375:

Higher Education Finance

Spring 2018

HIGHER EDUCATION ADMINISTRATION

Required Texts

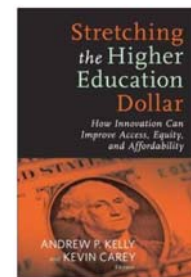


Higher Education Finance Research: Policy, Politics, and Practice

Authors: M. P. McKeown-Moak & C. M. Mullin
Publisher: Information Age Publishing, 2014
ISBN: 9781623964931

Stretching the Higher Education Dollar: How Innovation can Improve Access, Equity, and Affordability

Editors: A. P. Kelly & K. Carey
Publisher: Harvard Education Press, 2013
ISBN: 9781612505947



Revenue Generation Strategies: Leveraging Higher Education Resources for Increased Income ASHE Report, Vol 41, No. 1

Author: J. W. Alstete
Publisher: Wiley, 2014
ISBN: 9781119049067

Additional readings will be posted on the course website

Course and Program Policies

Attendance

Attendance in this course is mandatory. If absences from class are necessary, please notify the instructor as soon as possible. Please arrive on time, stay for the entire class, and refrain from unnecessary cell phone or computer activities.

Active Participation/Attendance

Students are expected to demonstrate their command of the subject matter through regular engagement with the instructor and fellow students.

Assignments and Deadlines

Unless otherwise noted, assignments are due by the beginning of class, even if

there is an absence. Late assignments will be penalized 10% of the available points for each day late for up to 5 days. After the 5th day late, a zero will be given for the assignment.

Email

All email communications will be sent to your SHSU email address. If you do not regularly check your SHSU email account, please make sure it is forwarded to an account you check often.

Professionalism and Civility

This course provides a professional environment consisting of colleagues within the same career field. When communicating your ideas, please refrain from using demeaning language or conducting personal attacks. If personal conflicts arise, please address them outside of the official course activities.

Doctoral Student Dispositions

When a student has completed 12 to 18 semester hours, a committee of doctoral



faculty meet to review progress and determine the candidate's status regarding admission to candidacy. Both academic performance and dispositions are considered. Students can be admitted to full candidacy, be allowed to continue on probation, or be removed from the program. Some of the behaviors and dispositions include being an engaged learner, attending class, observing ethical standards, respecting diverse viewpoints, submitting assignments by deadlines, demonstrating an attitude of professional growth, and maintaining a good academic performance in doctoral classes.

Peggy Holzweiss, Ph.D.

This is your instructor:



CONTACT INFORMATION

SHSU Box 2119
TEC 327G
Huntsville, Texas 77341
936.294.1144
pholzweiss@shsu.edu

OFFICE HOURS

By appointment – in person or via phone or video conference

PREFERRED COMMUNICATION

The best way to reach me is through email. I tend to keep regular work week hours (e.g., Monday through Friday, 8am to 5pm). I do not typically check email over the weekend.

TEACHING PHILOSOPHY

Research clearly demonstrates that students learn best when actively engaged in tasks that help them establish their own understanding of course content rather than passively gathering information from instructors.

Graduate education, in particular, focuses on the advanced development of skills and knowledge, so course tasks should be focused on more challenging steps in cognitive growth.

Activities in this course are concentrated on the advanced cognitive domains found in Bloom's Taxonomy – Applying, Analyzing, Evaluating, & Creating.



Students are expected to be engaged in their own learning by reading all assigned texts and materials, applying the information to course activities, and being resourceful in solving problems or seeking assistance.

University & College Policies

SHSU Academic Policy Manual- Students

- [Procedures in Cases of Academic Dishonesty #810213](#)
- [Disabled Student Policy #811006](#)
- [Student Absences on Religious Holy Days #861001](#)
- [Academic Grievance Procedures for Students #900823](#)

SHSU Academic Policy Manual-Curriculum and Instruction

- [Use of Telephones and Text Messengers in Academic Classrooms and Facilities #100728](#)

Visitors in the Classroom- Only registered students may attend class. Exceptions can be made on a case-by-case basis by the professor. In all cases, visitors must not present a disruption to the class by their attendance.



COLLEGE OF EDUCATION INFORMATION

Accreditation

The programs within the SHSU College of Education have the distinction of receiving accreditation and national recognition from multiple accrediting bodies. All educator certification programs, including teaching and professional certifications, have received ongoing accreditation from the Texas Education Agency ([TEA](#)). Additionally, the educator preparation program has been accredited by the Council for the Accreditation of Educator Preparation ([CAEP](#)-formerly NCATE) since 1954. Many of the educator preparation concentration areas have also chosen to pursue national recognition from their respective Specialized Professional Associations ([SPA](#)), signifying the program is among the best in the nation. The programs within the Department of Counselor Education have also received accreditation from the Council for Accreditation of Counseling and Related Educational Programs ([CACREP](#)).



Course and Program Evaluation

Near the end of the semester, students are asked to take part in the University's adopted course evaluation system, IDEA. The assessments are completed online and instructions are emailed to each student. Students' assessments of courses are taken and systematically reviewed by the Dean, Associate Deans, Department Chairs, and individual faculty members. Only after the semester has completed are faculty members allowed to view aggregated results of non-personally-identifiable student responses.



The College of Education conducts ongoing research regarding the effectiveness of the programs. Students receive one survey in the final semester prior to graduation regarding the operations of the unit during their time here. A second survey occurs within one year following completion of a program, and is sent to students and their employers. This survey requests information related to students' quality of preparation while at SHSU. Students' responses to these surveys are critical to maintaining SHSU's programs' excellence.

Assignments and Grading

NOTE: Unless otherwise noted, doctoral level written work is expected. All written work should be in APA format (12 point font, double spaced, 1 inch margins), and be error free (e.g., spelling, grammar, punctuation, etc.). Content should reflect critical thinking and analysis, reasoned arguments, and clear organization of thoughts. Papers not meeting doctoral level standards may be given back for a rewrite.

If you are challenged by any of these issues, please seek assistance from the SHSU Writing Center before you turn in written work. Their website is: <http://www.shsu.edu/wctr/>.

CURRENT EVENT REPORT AND PRESENTATION (25 points)

Students will review articles in *The Chronicle of Higher Education* or *Inside Higher Ed* for resource and finance topics from the last 6 months. The report is limited to two pages (double-spaced, APA format) and should discuss the importance of the topic to higher education finance, short-term implications, and long-term implications. Students will turn in the report then informally present the same information to the class for discussion. Students will be randomly assigned a date for the report and presentation.

LITERATURE REVIEW PAPER (300 points)

Students will write a literature review on an individually chosen topic. The review will need to incorporate a minimum of 40 scholarly resources, be a minimum of 20 pages (double-spaced, APA format), and follow a specified structure. The review will need to keep the higher education finance perspective in mind for both what literature is included and the implications of what is discovered. A final draft will be turned in and reviewed by two peers. Feedback from the peer review will then be incorporated into the final version.

FUNDING PROPOSAL AND PRESENTATION (175 points)

Students will write a proposal to request funding from a board. A 10-page proposal, one-page executive summary, and 15 minute presentation will be prepared. Students will have 15 minutes to formally present their proposal to the board. The board will award funding based on instructor provided criteria. All students will have an opportunity to be a member of the board. Students not presenting a proposal or participating as a board member will evaluate individual presentations and provide feedback.



REFLECTION PAPER (50 points)

Students will write a reflection paper that addresses personal competencies in higher education finance. A guide will be provided regarding questions to answer.



GRADES will be based on the points accumulated on the assignments:

- A=495 to 550 total points
- B=440 to 494 total points
- C=385 to 439 total points
- F=Below 385 total points

Note: The online gradebook on the course website will be updated so students can review their grades. However, the official gradebook is maintained offline.

Class Sessions and Topics

NOTE: This schedule of topics, readings, and assignments is subject to change. Students will be given advance notice of any changes in this schedule.

Wk	Date	Topic(s)	Read Before Class	Due at Beginning of Class
1	Jan 23	Introduction to the Course Brief History and Overview of HIED Finance	Alstete – pp. 1-27 McKeown – Chp. 1, 2 Kelly – Chp. 3 Posted Materials	
2	Jan 30	Overview of Revenue in Higher Education	McKeown – Chp. 1 Posted Materials	
3	Feb 6	State Funding and Performance-Based Approaches	McKeown – Chp. 5, 7 Posted Materials	Current Event Report 1 Project Topic due Literature Review Topic due
4	Feb 13	<i>Field Based – No Class Meeting</i>	Posted Materials	
5	Feb 20	Tuition, Fees, and Student Financial Aid	McKeown – Chp. 3 Posted Materials	Current Event Report 2
6	Feb 27	Research Funding and Private Money	McKeown – Chp. 4 Posted Materials	Current Event Report 3
7	Mar 6	<i>Field Based – No Class Meeting</i>	Posted Materials	
8	Mar 13	<i>Spring Break</i>	Posted Materials	
9	Mar 20	Overview of Expenditures in Higher Education Price vs. Cost of Higher Education	McKeown – Chp. 9 Kelly – Chp. 1, 2 Posted Materials	Current Event Report 4
10	Mar 27	Strategies for Revenue Generation in Higher Education	Alstete – pp. 28-113 Posted Materials	Current Event Report 5
11	Apr 3	Strategies for Reducing Costs in Higher Education	Kelly – Chp. 4 through 9 Posted Materials	Literature Review final draft
12	Apr 10	Accountability and Finance in Higher Education	McKeown – Chp. 6, 8, 10, 11, 12 Kelly – Chp. 10, p. 205-217 Posted Materials	Final Project Paper and Presentation copy
13	Apr 17	Project Presentations – Group 1	Posted Materials	Peer Review Feedback #1
14	Apr 24	Project Presentations – Group 2	Posted Materials	Peer Review Feedback #2
15	May 1	Project Presentations – Group 3	Posted Materials	Final Literature Review paper
16	May 8	Course Wrap-Up	Posted Materials	Reflection Paper

RESOURCES

Organization	Web Address	What you will find
60x30TX	http://www.60x30tx.com	Outlines 60x30 plan, provides report updates from around the state (includes dual credit, growth of graduate education)
Achieving the Dream	http://achievingthedream.org/resources/knowledge-center	Consortium of community colleges dedicated to student success and economic opportunity; shares research on various community college issues
American Association of University Professors	http://www.aaup.org/AAUP	Faculty Salary Reports
American Community Survey (ACS)	https://www.census.gov/programs-surveys/acs/	Part of the U.S. Census Bureau – can find a variety of demographic and workforce reports and data
American Council on Education	http://www.acenet.edu	Updates on federal budget for higher education
Bureau of Labor Statistics Publications	https://www.bls.gov/opub/	Labor projections, economic outlook, occupational outlook handbook (pay & trends by career field)
Center for Education Policy Analysis	http://cepa.stanford.edu/	Research on pk-16 education; focus on diversity, financial aid, and distance education issues for higher education
College Affordability and Transparency Center	https://collegecost.ed.gov/	Data on college costs, how fast they are going up and why (by institution, comparisons between institutions, national data), net price calculator
College Board	https://trends.collegeboard.org/college-pricing	Annual trends in college pricing report
Complete College America	https://completecollege.org/	Has a data dashboard (national and by state) for completion, transfers, time and credit to degrees, credit accumulation, gateway success, remedial enrollment and success
Consumer Price Index	https://www.bls.gov/data/inflation_calculator.htm	Consumer Price calculator (calculate the cost of things in different years)
Delaware Cost Study	http://ire.udel.edu/cost/	Reports from the National Study of Instructional Cost and Productivity
Delta Cost Project	https://deltacostproject.org/	IPEDS data in the area of finance, enrollment, staffing, completions, and student aid. Can do comparisons by state, Carnegie group, institution name, or institutional sector
Federal Student Aid office	https://studentaid.ed.gov/sa/about/data-center/school	Variety of financial reports include financial health, gainful employment (debt-to-earnings ratio), default rates
Gates Foundation	https://postsecondary.gatesfoundation.org/	Postsecondary education research in the areas of digital education, remedial education, technology-enabled advising, emergency aid, and transfer students
Grapevine	http://www.grapevine.ilstu.edu/	Annual reports on state tax support for higher education
Higher Education Price Index	https://www.commonfund.org/commonfund-institute/higher-education-price-index-hepi/	Inflation reports based on higher education expenditures
Integrated Postsecondary Education Data System (IPEDS)	https://nces.ed.gov/ipeds/	Government data of colleges – trend reports in enrollment, completion, etc., specific institution data, comparison data, finance data, etc.
Legislative Budget Board - Texas	http://www.lbb.state.tx.us/	Texas legislation, state budget information, dual credit reports, financial aid reports
National Association of College and University Business Officers (NACUBO)	http://www.nacubo.org/	Federal legislative updates; research on endowments, tuition discounting, benchmarking with other schools
National Association of Independent Colleges & Universities	http://www.naicu.edu	Research on private institutions
National Association of State Budget Officers (NASBO)	https://www.nasbo.org/mainsite/reports-data	Variety of financial and budgeting data and reports (e.g., state expenditure report, fiscal

		survey of states, improving postsecondary success through the budget process, etc.)
National Center for Education Statistics (NCES)	http://nces.ed.gov/	Research on student demographic characteristics, school and work experiences, persistence, transfer, and degree attainment.
National Center for Higher Education	www.higheredinfo.org	State-by-state comparisons on areas such as educational attainment, access, affordability, access, persistence, completion, etc.
National Center for Higher Education Management Systems (NCHEMS)	http://www.nchems.org/	Reports on outcomes-based funding, college attainment by state
National Collegiate Athletics Association	http://www.ncaa.org	Variety of reports on student athletes and athletic programs
National Postsecondary Student Aid Study	https://nces.ed.gov/surveys/npsas/	Data and reports on how students finance their college education (broad data as well as specific populations such as veterans, racial and ethnic groups, undergraduates, etc.)
Rockefeller Institute of Government	http://rockinst.org/education/accountability_higher_ed.aspx	Reports on accountability issues in higher education (primarily performance budgeting and its impact)
SACS Commission on Colleges	http://sacscoc.org	Accrediting standards for southern institutions
State Higher Education Executive Officers	http://www.shceo.org	National trends in state funding, enrollment patterns, revenue generation; variety of resources on state financing of higher education and financial aid
State Higher Education Executive Officers Association (SHEEO)	http://www.shceo.org/resources	Annual report on state funding, other policy resources on PK-16 education
Texas Association of Community Colleges	http://tacc.org	Data on Texas community college enrollment and funding; information on student success points
Texas Higher Education Coordinating Board	http://www.thecb.state.tx.us/	60x30 plan; Texas data on individual institutions and statewide issues such as demographics, enrollment, persistence, completion, financial issues, formula funding, etc.
<i>The Chronicle of Higher Education Almanac</i>	https://www.chronicle.com/section/Almanac-of-Higher-Education/141	Data on executive compensation, faculty compensation, demographics of staff and faculty, student demographics, enrollment, persistence, financial aid, costs of attendance, endowment amounts, state-by-state comparisons
The Lumina Foundation	http://www.luminafoundation.org	Reports on equity and college completion, affordability, vocational pathways
U.S. Census Bureau	http://www.census.gov/	Demographic information on specific communities, housing, economics, etc.
U.S. Department of Education	http://www.ed.gov	Data on college costs and affordability, financial aid, degree attainment and work patterns post-graduation, first-time students, etc.
U.S. Universities, by State	http://univsearch.com/	Colleges listed by state or alphabet; provides links to college websites
Voluntary System of Accountability	http://www.voluntarysystem.org/	Costs for participating schools (can compare institutions)