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## EDLD 540.50: Higher Education Finance

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The University of Montana  
Department of Educational Leadership  
Autumn 2013

## **EDLD 540 The Finance of Higher Education**

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### **REQUIRED READINGS:**

Text: Paulsen, M.B., & Smart, J. C. (2001). *The Finance of Higher Education: Theory, research, policy and practice.*

References: Other articles and PDFs

### **COURSE DESCRIPTION:**

EDLD 540 is an introductory course of a general understanding of Higher Education Finance. The College and University environment will be explored and analyzed through class discussions on Moodle and through individual assignments. Students in this course will be introduced to an overview of the breadth and depth of what we know today about the past, present, and projected understanding of the financing of higher education in the United States. By recognizing and understanding the essential characteristics and interrelationships among variables will help class participants to more fully comprehend the challenges.

### *Missions*

#### **The University of Montana-Missoula Mission Statement**

The University of Montana-Missoula pursues academic excellence as demonstrated by the quality of curriculum and instruction, student performance, and faculty professional accomplishments. The University accomplishes this mission, in part, by providing unique educational experiences through the integration of the liberal arts, graduate study, and professional training with international and interdisciplinary emphases. The University also educates competent and humane professionals and informed, ethical, and engaged citizens of local and global communities; and provides basic and applied research, technology transfer, cultural outreach, and service benefiting the local community, region, State, nation and the world ([www.umt.edu/mission.aspx](http://www.umt.edu/mission.aspx)).

#### **• The College of Education and Human Sciences Mission Statement**

The College of Education shapes professional practices that contribute to the development of human potential. We are individuals in a community of lifelong learners, guided by respect for knowledge, human dignity, and ethical behavior. We work together producing and

disseminating knowledge to advance the physical, emotional, and intellectual health of a diverse society.

- **Educational Leadership Mission Statement**

The mission of Educational Leadership at The University of Montana is to develop leaders for learning organizations who are guided by respect for knowledge, human dignity, and ethical behavior. This is accomplished by providing high quality academic and professional opportunities. We subscribe to a definition of leadership wherein individuals assume evolving roles within influence relationships requiring their contributions in order to achieve mutual purposes.

## CONCEPTUAL FRAMEWORK

The Professional Leadership Education Unit has adopted a conceptual framework that places central value on learning as a collaborative endeavor. The faculty in the Professional Leadership Education Unit believes that an educational orientation is insufficient and outmoded if it is based on isolated content, is teacher-dominated, and directed primarily toward passive students learning alone. Thus, it is the Unit's intent that education candidates at The University of Montana-Missoula will experience a cohesive learning community during their own preparation, with the goal that they will be disposed and equipped to create communities of learners in their own future educational settings.

The faculty has identified three essential elements of learning communities which form organizing themes or strands that permeate all the programs and drive the candidate proficiency outcomes:

- *Integration of Ideas*

Members of a learning community look beyond the traditionally segmented curriculum and think creatively about the interrelationships among subject areas. They work with a variety of fields of study and search for unifying themes that cross disciplinary lines. There is an emphasis on explaining realities and dealing with actual problems in contextual learning situations. *Students will utilize previous subject knowledge, outside readings, personal experience, and address actual educational problems in their development of their understanding and application of this content and its implications for understanding some concepts of financing as it is in a University setting.*

- *Cooperative Endeavors*

In a learning community, knowing and learning are viewed as communal acts, and all members can learn from each other. There is a commitment to engage all learners cognitively and emotionally in acquiring and sharing knowledge that is personally meaningful. In the process, members create a culture that encourages personal responsibility and active commitment to the group and its learning goals. *Students will participate in a variety of group discussions and will be assessed on their ability to be a contributing member to discussions and supporting their classmates in the Moodle discussions.*

- *Respect for Diversity and Individual Worth*

By definition, a learning community embraces diversity, requiring and valuing the input of all voices present. The ethics of care and mutual respect are viewed as essential for supportive

learning environments that enhance each member's self-esteem and foster risk-taking, creative conflict, and excellence. *Students are required to adhere to the Department of Educational Leadership's Professional Standards for Student Performance. They are also expected to participate in all tasks and discussions in a manner that promotes a scholarly environment where diverse ideas are tolerated and discussion is supported by informed opinion, and will achieve mutual purposes.*

### Expectations:

Students enrolled in this course are expected to demonstrate regular and consistent class attendance (Moodle discussions) and participate in all tasks and discussions in a manner that promotes a scholarly environment where diverse ideas are tolerated and discussion is supported by informed opinion. (Refer to *Professional Standards for Student Performance*, Appendix A).

Students are required to be current in the assigned reading for the course and to submit and/or present required assignments in a timely manner. Late assignments will be accepted if the student has informed the instructor and indicated a timeframe has been established when the assignment will be submitted. Please call 406-544-8541.

Written assignments will reflect the individual's original work and, when appropriate, follow the **American Psychological Association (APA) style**. All references to works by other authors must be properly cited. All written assignments must include a title page (see Appendix B) and a reference page as per the APA format. .

### ACADEMIC HONESTY:

All students must practice academic honesty. Academic misconduct is subject to an academic penalty by the course instructor and or disciplinary sanction by the university. All students need to be familiar with the Student Conduct Code. This code is available for your review online at <http://www.umt.edu/SA/VPSA/index.cfm/page1321>

### Accommodations:

"Students with disabilities will receive reasonable accommodations in this online course. To request course modifications, please contact me as soon as possible. I will work with you and Disability Services in the accommodation process. For more information, visit the Disability Services website at <http://www.umt.edu/dss/> or call 406.243.2243 (Voice/Text)."

### Class Lectures:

Each week Class lectures will be opened (available to students). The lectures will be presented through handouts or MS PowerPoint slides and can be found in the Moodle **course** week. You can download a free "view only" version of PowerPoint from Microsoft. The download can be located at <http://office.microsoft.com/en-us/downloads/results.aspx?qu=powerpoint&av=DCT000>. You can also download a viewer from UM Online at <http://umonline.umt.edu/StudentInfo/plugins.htm> - you will need to select the 2007 viewer which is the last download on the page.

### Moodle Discussions are **Required** and are weekly:

Each student must participate in for each Moodle discussion, at least **3** times in a week, to show that they have attended class. Class participation points will be awarded each week from these discussions. The Week will run from Tuesday through Monday. You will need to (a) post your original thread (answer one questions comprehensively- with substantive information and citations in the discussion, and the (b) respond to your 2 of your classmate's original discussion threads before Monday midnight of the following week. Discussion posts will be graded each week. Each class discussion will be monitored for student participation.

Each class students will receive one of the following scores for their participation:

- 3 points for thorough contributions that stimulate discussion including interacting with other students. Comprehensively answer one question and responding to 2 of your classmates original threads with substantive information. You also must cite from the text or another resources to support your answer.
- 2 points for contributions that stimulated discussion including interacting with other students. You may have tangentially cited from the text and not from another resource(s) to support your answer(s).
- 0 points for not participating

Since this is a graduate level course, discussion posts should utilize correct punctuation, grammar, and spelling. However, I too have typos so I understand but try to be sure you read over your response or original threads before you enter it into the discussion.

### There are four Discussion Areas for your use and attention.

1. General Course Questions (Optional)
2. General Class Discussion (Optional)
3. Discussion Questions to Dr. O'Reilly (Optional)
4. Weekly Moodle Discussions (Required)

### Assignments:

NOTE: All assignments should use a cover page (see Appendix B)

In addition to the assigned readings, expectations of class participation and adherence to the Professional Standards for Student Performance, each student will be required to complete the following assignments:

1. **Paper #1 Due October 14 Issue in Higher Education Finance.**
2. **Paper #2 Case Study Critique Due by Midnight November 18**
3. **Moodle Discussion: The class discussion starts on Tuesday and you are required to enter at least 3 times before Midnight Monday of the next week.**

### Evaluative Criteria:

**Moodle Discussions 30%**

**Paper #1 30% total : 10% for posting on Moodle a summary to share with your classmates and 20% for the paper emailed to Dr. O'Reilly**

**Paper #2 35% total : 10% for posting on Moodle a summary to share with your classmates and 25% for the paper emailed to Dr. O'Reilly**

### *General Course Questions (Optional)*

This is an optional discussion area where students can post general course questions (rather than student specific questions) for Dr. O'Reilly to answer. To ensure a timely response, please e-mail Dr. O'Reilly ([frances.oreilly@umontana.edu](mailto:frances.oreilly@umontana.edu)) that you have posted a general course question.

### *General Class Discussion (Optional)*

This is an optional discussion area where students can post questions or prompts to further the discussion and interaction among classmates. It is suggested that anyone posting in this area send an e-mail message to the entire class so that everyone has the opportunity to participate in the discussion.

### *Discussion Questions to Dr. O'Reilly (Optional)*

This is an optional discussion area where students can pose questions (specific to that particular week topic) to the instructor in much the same way that a question might be posed during a face-to-face class session. To ensure a timely response, please e-mail Dr. O'Reilly ([frances.oreilly@umontana.edu](mailto:frances.oreilly@umontana.edu)) that you have posted a discussion question for her response.

### **Submitting Assignments:**

Assignments will be submitted electronically by e-mailing them to Dr. O'Reilly ([frances.oreilly@umontana.edu](mailto:frances.oreilly@umontana.edu)). I prefer the email to me for assignments as Moodle is not always reliable. Save your documents using word and the format and assignment names listed below. *Please follow the provided format and spell each assignment as it is in the following example.*

Your saved assignment should contain the following information in the order provided in the example (including spaces).

EDLD 540 Autumn 13 Assignment Name and [Your Last Name]

Example for Roberta Jones:

EDLD 540 Au 13 Paper #1, Title of Paper, and Jones

EDLD 540 Au 13 Paper #2, Title of Paper, and Jones

**You will be responsible for any correspondence that is sent to you on your umconnect email.**

Correspondence to you regarding this course will usually utilize your um connect email account.

While it is recommended that you check your um connect email account regularly (once of day), there is a way that you can have messages sent to your um connect email account forwarded to another e-mail account. While doable, there are drawbacks to having your messages forwarded.\*

Forwarding your um connect email messages to another e-mail account\*

1. Log in to your um connect email account
2. Click on "rules"
3. Create new rule
4. Name new rule
5. Keep everything blank until the bottom of the page where it says "enter new e-mail"
6. At this point you enter the e-mail address where you want your um connect email forwarded
7. YOU MUST THEN CLICK SAVE or all your efforts will be in vain. ☺

\*One negative side effect of this procedure is the problem of replying to the original message. When your um connect email has been forwarded to another email account there is a problem with replying. In order to reply to the original e-mail, you must insert the e-mail address where you want your message to go. If you just hit “reply” your reply will be sent only to your um connect email account and NOT to the intended recipient!

#### Needing Help:

If you encounter problems regarding this Moodle Course please contact UOnline at <http://umonline.umt.edu/ContactUs/default.htm>. There is also a Tech Support area within the menu of the course shell. Telephone for help: 243-4999

For questions regarding your NetID (formerly SCAUID), changing NetID passwords, email accounts, and general computer assistance:

IT Central Help Desk: (406) 243-4357, [itcentral@umontana.edu](mailto:itcentral@umontana.edu)

#### **Moodle Technical Support:**

Moodle Support (406) 243-4449

IT Central

(406) 243-4999, [courseware-support@umontana.edu](mailto:courseware-support@umontana.edu)

General registration information:

Registration Help Desk (Griz Central), (406) 243-6077

#### **Accommodations:**

I want to be sensitive to any special needs that you may have. If you require some special accommodation or you are uncomfortable with some aspect of this course, I invite you to discuss these matters with me.

Students with disabilities may request reasonable modifications by contacting me. The University of Montana assures equal access to instruction through collaboration between students with disabilities, instructors, and Disability Services for Students (DSS). “Reasonable” means the University permits no fundamental alterations of academic standards or retroactive modifications. (For other options see <http://life.umt.edu/dss/>).

#### **Tentative Class Topics and Assignments:**

<b>Date</b>	<b>Day</b>	<b>Topic</b>	<b>Assignment</b>
Week 1 Sept 9-16		Forum : class participant’s Introductions and discussion. If you have any questions there are 3 forums to use to ask those questions. Also please email me with the questions <a href="mailto:frances.oreilly@umontana.edu">frances.oreilly@umontana.edu</a> . Please read and respond to the PDFs of the <i>Center on Budget and Policies Priorities: Update on State Budget Cuts</i> etc. located in Moodle shell. Respond by commenting on the discussion article in the Moodle Discussion. <b>When answering the questions support your answer with citations from the text and from additional resources for a complete answer.</b>	

- Week 2  
Sept. 17-23
- Read Chapter 1: *The Revenue and Expenditures, Costs, and Affordability Of Higher Education*. Answer the discussion questions in Moodle. When answering the questions support your answer with citation from the text and from additional resources for a complete answer.
- Week 3  
Sept. 24- 30
- Read Chapter 2: College Education: Who Can Afford it? Answer the discussion questions in Moodle. When answering the questions support your answer with citation from the text and from additional resources for a complete answer.
- Week 4  
October 1-7
- Read Chapter 5: Costs and Productivity in Higher Education: Theory, Evidence, Policy and Implications. Answer the discussion questions in Moodle. When answering the questions support your answer with citation from the text and from additional resources for a complete answer.
- Week 5  
October 8-14
- Read Chapter 7: The Paradox of Growth in Federal Aid for College Students 1960-90.  
Answer the discussion questions in Moodle. When answering the questions support your answer with citations from the text and from additional resources for a complete answer.
- Paper #1 due October 14 by midnight** and emailed to Dr. O'Reilly at [frances.oreilly@umontana.edu](mailto:frances.oreilly@umontana.edu)
- This paper will be an analysis and critique of a student selected pertinent issue in the financing of Higher Education . The paper must be supported with at least multiple citations (5 at a minimum) from the text and other resources to support your analysis and critique. This paper should be 6-8 pages in length and APA format.
- Week 6  
October 15-21
- Read Chapter 8. Efforts to Keep Public College Affordable in the Face of Fiscal Stress. Answer the discussion questions in Moodle. When answering the questions support your answer with citations from the text and from additional resources for a complete answer.
- Week 7  
Oct. 22-28
- Read Chapter 10: The Role of Finances in Student Choice: The Review of Theory and Research. Answer the discussion questions in Moodle. When answering the questions support your answer with citations from the text and from additional resources for a complete answer.
- Week 8  
Oct. 29-Nov.4
- Read Chapter 11: Access to Postsecondary Education: Financial Equity in an Evolving Context. Answer the discussion questions in Moodle. When answering the questions support your answer with citations from the text and from additional resources for a complete answer.
- Week 9
- Read Chapter 13: The Finance of Community and Technical Colleges.



Nov. 5-11 Answer the discussion questions in Moodle. When answering the questions support your answer with citations from the text and from additional resources for a complete answer

Week 10

November 12-18 Read Chapter 15: The Finance of Higher Education: Implications for Theory, Policy, Research and Practice. Answer the discussion questions in Moodle. When answering the questions support your answer with citation from the text and from additional resources for a complete answer

Final paper due on the case study on the State case you were given to analyze and update. The Articles will inform you how the state you were assigned have addressed in 2005-2006 the financing of Higher Education in that particular state. I would like for you to analyze and critique this approach and support your analysis with citations from the text and other resources.

In addition, I would like for you to follow-up with information on that assigned state after they had put their approach to funding higher education into effect. Look on websites for that state and see, for example, have enrollments in Higher Ed Institutions fluctuated-have they increased, decreased or stabilized?

What is the state of their 2 year institutions? What is the state of their 4 year institutions? How about the tuition increased? Decreased? Stabilized?

This paper must be emailed to the professor by November 18 **by midnight** at frances.oreilly@umontana .edu. unless the student has asked for and received permission for more time to complete the assignment.

**THE SYLLABUS IS SUBJECT TO CHANGE.**

## APPENDIX A

**PROFESSIONAL STANDARDS FOR STUDENT PERFORMANCE**

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Graduate students in the Department of Educational Leadership at  
The University of Montana are expected to:

- Demonstrate professional vision in the practice of educational administration
- Accept responsibility and accountability for class assignments in their role as members of the class
- Demonstrate growth during the period of their graduate career
- Demonstrate good decision making and an awareness of organizational issues from a variety of perspectives
- Demonstrate imagination and originality in the discussion of educational leadership issues
- Understand the relationship between theory and practice and the value of reflective leadership
- Demonstrate a moral, humanistic, ethical and caring attitude toward others
- Demonstrate an ability to build trust and positive relationships with others
- Demonstrate a tolerance for diversity and a warm acceptance of others regardless of their backgrounds or opinions
- Demonstrate emotional stability and an ability to work well with other members of the class, including the instructor
- Demonstrate an ability to express himself/herself well in speech and writing, and
- Demonstrate mastery of fundamental knowledge of course content and an understanding of its application

**FAILURE TO DEMONSTRATE THE AFOREMENTIONED QUALITIES ON A CONSISTENT BASIS MAY  
RESULT IN REMOVAL FROM CLASSES AND/OR THE EDUCATIONAL LEADERSHIP PROGRAM.**

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APPENDIX B

Name of the Assignment

Your Title for the Assignment

by  
Your Name

Submitted to  
Dr. Frances L. O'Reilly

In Partial Fulfillment of the Requirements of  
EDLD 540: The Finance of Higher Education

The University of Montana  
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