



COLLEGE OF EDUCATION AND HUMAN DEVELOPMENT

Department of Educator and Leadership Preparation

COURSE NUMBER AND TITLE: EDAD 5352 Advanced Educational Finance and Facilities

PREREQUISITES FOR THIS COURSE: Acceptance in the Superintendent Certification Program

COURSE DESCRIPTION: Creative and systematic planning of school facilities focusing on translation of psychological and educational needs into physical form and design. Students will research theories and practices for space allocation, organizational structure, budgeting, and finance. This course focuses on the state's school funding history and fund distribution process used to fund Texas schools and charters. The study connects the distribution of federal, state, local, and grant monies, based on a diverse population of students, and the tax base of each learning community. The Texas System of taxing will be examined to best understand the distribution process as schools and charters endeavor to provide educational services while modernizing and updating the infrastructure of school buildings to best serve communities.

COURSE CREDIT: Three hours graduate credit

TERM OFFERED: Fall, 2026

LOCATION OF CLASSROOM: Southwest ISD Administration Bldg. Saturdays from 8:00-12:30

COURSE GOALS AND OBJECTIVES:

One of the goals of this course is to provide administrative and instructional leadership experiences that will 1.) Be of High Transfer - Learner-focused, inquiry oriented, problem - based, field-based, real school problems addressed through simulation, role playing, and analysis of authentic scenarios and 2.) Strengthen the application of integrated / connected relationships, search for meaning and sense-making and 3.) Require teaching and crafting assignments that require holistic understanding, constructed knowledge, systems-thinking, and collaboration in a culture of learning communities and 4.) Broaden and add relevance to student experiences by organizing featured presentations by architects, engineers, practicing Superintendents, Chief Executive Officers, attorneys, and Board Members and 5.) Research topics connected and relevant to the study of finance and facilities.

Our educational leadership classes will be responsive to a changing educational and cultural climate while demonstrating mindfulness in implementing learning strategies recommended by several educational administration national commission reports, but specifically from the National Commission for the Advancement of Educational Leadership Preparation (NCAELP).

COURSE REQUIREMENTS: This hybrid course will engage students in the study of the Superintendency by establishing finance and facilities connections/budgetary relationships during 1.) discussions / lecture, 2.) connected weekly assignments requiring reading analysis of school documents, and 3.) research of case studies and their educational impact and 4.) analysis of scenarios typical of school district settings and 5.) the research for class presentations and 6.) featured presentations by experts. Major projects will consist of reviewing and analysis of finance training videos, construction of instructional programs with finance and facility components, learning how budget codes addressed in the Financial Accountability Rules and Guidelines handbook apply to each school and district program.

Student group presentations, lectures, and discussion questions will provide opportunities for the students to experience key district operations. Researching topics to write board agenda items that will authorize them to adopt a budget, set the tax-rate, schedule public hearings, engage in demographic studies to establish student population and facility needs, and to explore bond issues to build facilities will enrich their leadership experience.

Response to on-line assignments will convey the degree to which the student sees the connection and impact that finance and facilities has on the physical, intellectual, and emotional disposition of a learning community. As a future Superintendent, administrator and instructional leader, clarity of thought, originality, and quality of written responses will be important. All written work should be typed and submitted with correct spelling, grammar, style, syntax, and uploaded into blackboard. Bibliographic entries should be utilized when appropriate. The American Psychological Association's Publication Manual is recommended as an approved guide.

WEBSITE LOCATION: Texas A&M University San Antonio Home Page at <http://www.tamusa.edu> and click on the Blackboard link <http://tamusa.blackboard.com/>

INSTRUCTOR'S NAME: **Juan Antonio Jasso, Ed.D.**
Superintendent Studies
Cell phone: 210-823-0697

Suggested RESOURCES: Texas Education Agency's Documents (SOF)
An Administrator's Guide to Finance Codes (2024) Provided by Region 20



HISD_Budget
Code_Book_2023-2024



Public School Finance
Glossary 2017.pdf



Finance Interview
Questions with a CFO



FIRST2022SWISD.pdf



glossary-of-construct
ion-terms.pdf

[America's Unsafe Schools - Gravelly Law - Texas Construction Defect Lawyers](#)



texas-public-school-finance-overview.pdf



Seven Key Problems
With Texas School Fin

USEFUL WEBSITE LOCATIONS FOR STUDY AND/OR RESEARCH MATERIALS;
COURSE STANDARDS:

https://www.tx.nesinc.com/Content/StudyGuide/TX_SG_SRI_195.htm

This course also meets the competency-based requirements and standards established by the TExES Preparation Manual – Superintendent, for all three domains:

COURSE STANDARDS:

Superintendent Standard I T

Learner-Centered Values and Ethics of Leadership:

A superintendent is an educational leader who promotes the success of all students by acting with integrity, fairness and in an ethical manner.

Superintendent Standard II

Learner-Centered Leadership and School District Culture: A superintendent is an educational leader who promotes the success of all students and shapes school district culture by facilitating the development, articulation, implementation and stewardship of a vision of learning that is shared and supported by the school community.

Superintendent Standard III

Learner-Centered Human Resources Leadership and Management: A superintendent is an educational leader who promotes the success of all students by implementing a staff evaluation and development system to improve the performance of all staff members, selects and implements appropriate models for supervision and staff development and applies the legal requirements for personnel management.

Superintendent Standard IV

Learner-Centered Policy and Governance: A superintendent is an educational leader who promotes the success of all students by understanding, responding to and influencing the larger political, social, economic, legal and cultural context and by working with the board of trustees to define mutual expectations, policies and standards.

Superintendent Standard V

Learner-Centered Communications and Community Relations: A superintendent is an educational leader who promotes the success of all students by collaborating with families and community members,

responding to diverse community interests and needs and mobilizing community resources.

Superintendent Standard VI

Learner-Centered Organizational Leadership and Management: A superintendent is an educational leader who promotes the success of all students by leadership and management of the organization, operations and resources for a safe, efficient and effective learning environment.

Superintendent Standard VII

Learner-Centered Curriculum Planning and Development: A superintendent is an educational leader who promotes the success of all students by facilitating the design and implementation of curricula and strategic plans that enhance teaching and learning; alignment of curriculum, curriculum resources and assessment; and the use of various forms of assessment to measure student performance.

Superintendent Standard VIII

Learner-Centered Instructional Leadership and Management: A superintendent is an educational leader who promotes the success of all students by advocating, nurturing and sustaining a school district culture and instructional program conducive to student learning and staff professional growth.

This course meets the following TExES Domains and Competencies:

Domain I Leadership of the Educational Community

Domain II Instructional Leadership

Domain III Administrative Leadership

Competency 001- The superintendent knows how to act with integrity, fairness, and in an ethical manner in order to promote the success of all students.

Competency 002- The superintendent knows how to shape district culture by facilitating the development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by the educational community.

Competency 003- The superintendent knows how to communicate and collaborate with families and community members, respond to diverse community interests and needs, and mobilize community resources to ensure educational success for all students.

Competency 004- The superintendent knows how to respond to and influence the larger political, social, economic, legal, and cultural context, including working with the board of trustees, to achieve the district's educational vision.

Competency 005- The superintendent knows how to facilitate the planning and implementation of strategic plans that enhance teaching and learning; ensure alignment among curriculum, curriculum resources, and assessment; and promote the use of varied assessments to measure student performance.

Competency 006- The superintendent knows how to advocate, nurture, and sustain an instructional program and a district culture that are conducive to student learning and staff professional growth.

Competency 007- The superintendent knows how to implement a staff evaluation and development system to improve the performance of all staff members and select appropriate models for supervision and staff development.

Competency 008- The superintendent knows how to apply principles of effective leadership and management in relation to district budgeting, personnel, resource utilization, financial management, and technology use.

Competency 009- The superintendent knows how to apply principles of leadership and management to the district's physical plant and support systems to ensure a safe and effective learning environment.

Competency 010- The superintendent knows how to apply organizational, decision-making, and problem solving skills to facilitate positive change in varied contexts.

Advanced Educational Finance and Facilities**EDAD 5352****Saturdays 8:00 a.m.-12:00 p.m.**

Main Course Assignments: The Texas Finance System is a complex model that uses formulas and weights to equitably distribute funding to all school districts and charters in the State of Texas. The system's reliance on property values has been and continues to be a point of contention. Mainly, it has been a challenge to address the ever-changing diversity of student populations, aging facilities, and economic dispositions in each district. The goal of this course is to approach the study of finance and facilities as interrelated and its impact on student academic achievement and school climate. The ability for many local districts to fully fund their schools through their tax efforts is not happening even with the distribution of state and federal funding. While the finance model aims for equity, it continues to be a challenge that remains unresolved due to social, legal, economic, educational, political and ethical factors.

All assignments will be submitted through blackboard where they will be graded and where the instructor will provide feedback. *(For each assignment the high standard of presentation before the board of trustees or school colleagues will be expected.)*

Superintendent Standard IV, V, VI,
Competencies 002, 004, 008, 009,

1. Tax Rate Calculation Exercise - Using the Summary of Finances (SOF) on [This link takes students to the TEA website.](#) calculate the total tax, the M&O and I&S tax that the district would be collecting from residents and businesses for the properties listed, if they had the noted assessed values. Due 10/13 10 pts.



Assignment Tax Rate
Calculation Exercise.docx

2. Using Policy Online, provide 5 Board Related highlights of the policy listed as per instructions. Due 10/13 5 pts.



Facility Assignment
Policy 1 CV Facilities C

Featured Speaker 10/17: Brandon Crisp, SWISD Interim Supt., on Preparing for a Bond Issue

3. Student Presentation: District Facility Challenges (Team 3)

Aging infrastructure and chronic underfunding are the primary drivers of common facility issues in Texas schools. With limited budgets, districts often defer maintenance, leading to widespread and costly problems with critical systems like **heating and air conditioning, plumbing, roofing, classroom technology** and now **safety and security**. What are the problems in each area and what are potential solutions. What will a bid or contract look like to improve/increase safety and security? Board action? A facility plan? Potential cost? Pics? Videos? Cite a legal case like Abbot v. Burke (New Jersey) and San Antonio ISD v. Rodriguez (Texas)

Due 10/17 20 pts.

Superintendent Standard IV, V, VI, VIII
Competencies 002, 003, 004, 008,

4. Budget Code Exercise 1 - **Build** a budget code to fund the listed items for the indicated school using a Finance Resource Guide (Region 20) or district business resources.

Due 10/20 10 pts.



Assignment 1 Budget
Codes and Finance Ex



HISD_Budget
Code_Book_2023-2024

5. Using Policy Online, provide 5 Board Related highlights of the policy listed as per instructions.



Facility Assignment
Policy 2 CHF Payment

Due 10/20 5 pts.

Featured Speaker 10/24: Rafael Bedolla, Pfluger Architect, on Construction and Facilities work after Bond Issue passes.

6. Student Presentation: Bond Issue Review of Documents (Team 4)

Texas school districts issue bonds to fund major capital projects like new buildings, renovations, and safety upgrades, which require voter approval and are repaid through property taxes. Recent trends show a surge in bond issuances driven by legislative changes increasing homestead exemptions and the need to address rapid growth and needed facilities, particularly in districts like Harlandale, Cotulla, Poteet, and Southwest ISD. This presentation will focus on the process of constructing the bond information packet that may go to businesses, patrons, faculties, and other interested and influential entities. Students will discuss district-wide assessments conducted, TEA participation if applying for IFA funding, voter education, specific ballot language, explanation of tax rates and impact on homeowners, roles of administration and the major components of the bond literature.

Due 10/24 20 pts.

Superintendent Standard I, II, IV, V, VI,
VIII Competencies 002, 003, 004, 008,

7. Summary of Finances District Comparison - After comparing the allocations of a small, midsize, and large school district, discuss **5 observations** from your comparison of these allocations that have a direct impact on the education of students in these districts. One of the common terms used in the discussion of finance in our system is "tax effort". In simple terms, this means the ability and willingness to raise taxes to support educational endeavors by a school district community. Once you locate the SOF on the TEA website you can hover /highlight information and do a search for an explanation.



Assignment 2024
Summary of Finances

Due 10/27 10 pts.

8. Using Policy Online, provide 5 Board Related highlights of the policy listed as per instructions.



Facility Assignment
Policy 3 CS Facility Str

Due 10/27 5pts.

Featured Speaker 10/31: Dr. Alexis Gutierrez, Region 20 Coordinator of State and Federal Funds.

9. Student Presentation: Effective Transportation Maintenance and Replacement Plan (Team 1)

Address the major components of a Transportation Maintenance and Fleet Replacement Plan. Preventive maintenance is key to the success of the plan as well as providing safe and comfortable transportation for all students to all academic events. Record keeping that identifies how many miles students are transported is key for reimbursement. Key to budgeting is the effective monitoring of the mileage of vehicles, age, model, engine size and record that clearly identifies the investment that the district is making on the fleet. What will a bid to install AC's on buses or a Maintenance Program for the fleet look like? Board action? Potential Cost? Pictures? Videos? Legal case like Bell v. Wilkinsburg School District (2026)

Due 10/31 20 pts

Superintendent Standard I, II, IV, V, VI,
VIII Competencies 002, 003, 004, 008,

10. Budget Code Exercise 2 - Build a budget code to fund the listed items for the indicated school using a Finance Resource Guide (Region 20).

Due 11/3 10 pts.



Assignment 2 Budget
Code Exercise.docx



HISD_Budget
Code_Book_2023-2024

11. Using Policy Online, provide 5 Board Related highlights of the policy listed as per instructions.

Due 11/3 5 pts.



Facility Assignment
Policy 4 CVA Competi

Featured Speaker 11/7: Dr. Elizabeth Krimbill, TAMUSA Professor, Mental Health First Aid

12. Cotulla ISD Summary of Finances- The purpose of the following exercise is for students to become familiar with formulas and how their calculations are used to make the necessary funding adjustments to best serve student populations in whatever district they may reside. The district basic allotment (BA) becomes the basis for these calculations. Showing your calculations is required.

Due 11/10 10 pts.



Assignment 2024
Cotulla ISD SOF Exerc

13. Using Policy Online, provide 5 Board Related highlights of the policy listed as per instructions. Due 11/10 5 pts.



Facility Assignment 5
Policy CVB Competiti

Featured Speakers 11/14: Facility and Construction Seminar, Marmon Mok Architects and connections by Dr. Ball and Dr. Jasso.

14. Effective HVAC systems maintenance plans

What are the major components of an HVAC system plan? What types of calibrations of the system are critical as well as the plan to replace older models for newer, more effective models. An interview with a Facilities Director may be a good source. Due 11/17 10 pts.

15. Budget Scenario 1- Using your knowledge of how funding is distributed by the state, the district, and the federal government, provide reasonable projections as you build a proposed budget for a new program. Use your best estimation on personnel and support staff based on the number of students that you have. How many students would be special ed, at risk etc. You have enough experience to make sound decisions and if you need more money, go ahead and request these with a rationale. Think of it as if it was a small school district and you were putting together a budget, also make note of what expenditure will be the district's responsibility. Due 11/17 10 pts.



Budget Scenario
1.docx

Featured Speaker 11/21: Dr. Lacey Gosch, Assistant Supt of Technology, Judson ISD will address the role of the Technology Department in new construction and remodeling.

16. Student Presentation: Effective District Technology Plan for Elementary and Secondary Schools **(Team 2)**

Address the major components of the District Technology Plan related to technology at the Elementary and Secondary levels. The Texas Education Agency's (TEA) Long-Range Plan for Technology (LRPT) for 2018–2025 provides recommendations for integrating technology into Texas schools. The plan's six strategic goals and 18 focus areas are intended to reflect current technology trends and priorities in education. One of these recommendations is to use open educational resources (OER) and online curriculum like the Texas Virtual School Network (TXVSN) to improve classroom instruction.

Due 11/21 20 pts.

17. Final Exam

The Final Exam (Preparation Manual) assesses all standards, domains and competencies that will be tested on the TExES Superintendent (195) exam.

Due 12/10 20 pts.

Course Grade	Course/Class Points
A	121-135 +
B	109-120
C	94-108
D	81-93
F	80 or below (.74)
I*	Incomplete

***The spirit of an "Incomplete" is to give a student an opportunity to complete a course after the end of the semester. An Incomplete will only be considered under specific circumstances:**

1. 70% of the class has been completed and student is passing with a "C" or better.
2. The circumstance for which the "I" is requested is supported with documentation.
3. Student has been attending class on a regular basis. Incompletes are not to be used to remedy excessive missed classes. The unforeseen circumstances precipitating the request for an "I" should occur near the end of the semester.

* In order to be eligible for consideration for an "I"

(incomplete), you must have completed 75% of the coursework and have a "C" or better in the course. Generally, reasons for requesting an incomplete include but are not necessarily limited to, medical emergency, unforeseen crisis, death in the family and so forth. Circumstances for the request must be extenuating and available documentation should be supplied to your professor. If an "I" is granted, a contract outlining the timeline and conditions for completion will be constructed by the professor.

Dropping this Course: If you decide not to attend this class or find yourself doing poorly, it is your responsibility to drop the class. Faculty are not responsible for dropping students from a course. If you do not drop the course, you run the risk of receiving a letter grade at the end of the semester. Absences and late work will have an impact on your final grade.

Americans with Disabilities Act

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 reasonable accommodation of their disability. If you believe you have a disability that may require accommodation, please contact Disability Support Services for the coordination of services. DSS is located on the 1st floor of the Madla Building. The phone number for DSS is (210) 784-1335.

Academic Dishonesty

Students at Texas A&M University-San Antonio are expected to adhere to the highest standards of academic honesty and integrity. Academic Dishonesty for which a student is subject to penalty includes cheating, plagiarism, fabrication, **multiple** submission, misrepresentation of academic records, facilitating academic dishonesty, unfair advantage, violating known safety requirements and ethical misconduct. This includes holding other students to the same standards and reporting any incidents of alleged violation of the honesty policy to the instructor involved or, if necessary, to the appropriate academic department head. All students are responsible for being familiar with the Academic Dishonesty Policy which may be found in the Texas A&M University-San Antonio Student Handbook.

No Use of Generative AI Permitted

EDAD 5317 assumes that all work submitted by students will be generated by the students themselves, working individually or in groups. Students should not have another person/entity do the writing of any portion of an assignment for them, which includes hiring a person or a company to write assignments and/or using artificial intelligence (AI) tools like ChatGPT. Use of any AI-generated content in this course qualifies as academic dishonesty and violates Texas A&M-San Antonio's standards of academic integrity.