University of Oregon
School of Planning, Public Policy and Management
PPPM 629: Public Budget Administration
Fall 2022 (CRN: 15267) – 4 credits

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Office Hours: M 2-3 & Tu 10-11. Sign up here:
https://calendly.com/rlewis9uoregon
Class Time: T/Th 2-3:50 * note – will usually end
at 3:20 PM (see below)
Room: 116 Education

Course Description

This course covers a variety of topics related to government budgeting including the budgeting process, revenue sources, capital budgeting, infrastructure financing, debt, and economic development. The course will focus primarily on local and state budgeting and finance. The primary intent of this course is to provide students with an understanding of the local budgeting process and state and local government revenues. Through a series of applied assignments, students will develop proficiency in public sector budgeting. Upon successful completion of this course, students should be able to apply their understanding of budgeting to divergent circumstances.

Learning Outcomes:
- Know how local budgets are developed, modified, and approved
- Describe various revenue sources available to local and state governments and suggest specific revenue sources for specific purposes
- Explain the relationship between revenue generation and planned expenditures to meet balanced budget requirements
- Distinguish between a "good" and "bad" budget
- Explain the difference between capital and operating budgets
- Know what kind of information can (and should) be found in capital and operating budgeting documents
- Describe how local jurisdictions influence economic development through taxes and incentives

This graduate course is part of the MPA core curriculum and is open to CRP and MNM students. Other students may enroll with permission of the instructor. Students should have familiarity with Microsoft Word, Excel and Powerpoint, basic algebra skills, and a calculator.

Modality

This is an **in-person course** meaning that you are expected to attend class on T/Th in Education 116. I will accommodate absences as described in the Absences policy below. I may facilitate participating remotely or sharing of Zoom recordings in some cases if you communicate with me in advance. If you need additional flexibility, UO encourages you to consider ASYNC WEB courses. If you need accommodation related to a medical or other disability, you can request

those by working with the Accessible Education Center.

Course Website
We will Canvas in this course. Log into canvas.uoregon.edu using your DuckID to access our class. The class syllabus, announcements, some readings and other materials will be posted on the Canvas site. Additionally, all assignments will be submitted on the Canvas site. Syllabus updates will be posted to the Canvas site and revisions will be described for each revised version. I will use the email and announcement functions in Canvas to communicate with you. It your responsibility to check email and messages for class updates. Please adjust your Canvas notification settings accordingly. If you have questions about accessing and using Canvas, visit the Canvas support page. Canvas and Technology Support also is available by phone or live chat: 541-346-4357 | livehelp.uoregon.edu

This year, I will release modules & assignments as we progress throughout the term to pace assignments. I will release the following week's module on Thursday at 4 PM after class. Written assignments will be posted in class in Week 2 (Assignment 1), Week 3 (Applied Group Project) and Week 4 (Assignment 2). We will discuss each assignment in class during the week it is posted.

Communication
How can will I communicate with you?
- I will use the Canvas site to communicate about deadlines, assignments, or other topics that are relevant to the entire class. Announcements and emails are archived there and automatically forwarded to your UO email, and can even reach you by text. Check and adjust your settings under Account > Notifications.
- When I need to get in touch with individual students, I do so through email via Canvas.
- When giving feedback on assignments, I do so in Canvas, and turnaround time for written assignments is generally 7-10 days. Quizzes will be graded by Tuesday of the following week to discuss common issues during class.
- Please check Canvas email & announcements prior to attending class—if case that there is a COVID-related interruption, I will notify students through Announcements.

How can you communicate with me?
If your question is a practical, yes/no one about an assignment, reading, or other component of our class, please post your question on the Discussion thread titled "Class Questions and Answers," which I respond to daily, and where your peers can also pose questions and share answers.

If your question is about a technical challenge with Canvas, Zoom, or another technology, please contact the UO Service Portal."

If your question, concern, or excitement is about course content or activities, about something personal, is time sensitive, or is something else that doesn't feel like it fits above, please do reach out to me by email or by attending office hours! If you contact me with a question, I will try to respond within one business day.

Email is the generally best way to get in touch with me. I I am generally very prompt in replying to emails, so if you have not heard from me within 48 hours, I encourage you to re-send the email. I do not regularly check email in evenings or consistently on the weekends. I will let you know in advance if I plan to be away from email near assignment deadlines. If you prefer to talk by phone, you can call me or leave me a voicemail. I receive email messages when you leave voicemails with my office number (541-346-4432.) If you leave me a message, I will get back to you by phone or email. *Note that my email address is rlewis9@uoregon.edu – there is another Rebecca Lewis in the UO Directory.*

Why should you reach out to me?
Talking with my students about our course material is fun—confused or excited about something? Wondering how what we're learning relates to current events, career choices, or other classes you can take UO? Please be in touch! Please also be in touch to tell me how you are doing in the course. If you are having trouble with some aspect of it, I would like to strategize with you. I believe every student can succeed in this course, and I care about your success.

Office hours details:
When & where: I will host drop in office hours each week from 2-3 on Monday and 10-11 on Tuesdays. You can make an appointment) https://calendly.com/rlewis9uoregon or show up to my office (247A Hendricks.) I am happy to meet remotely or in person. I welcome meetings outside my regular office hours. If you experience Internet access challenges, my office phone (541-346-4432) is a good way to reach me.

What: During office hours, students bring in a wide range of concerns, questions, and successes. We might talk through a specific concept or problem to clarify it, might think together about an issue a student is curious about that relates to the class, might discuss a students' post-graduation goals, might identify more supportive methods to study, or any number of other topics.

Class Materials
There is one required text for this course:
- Robert L. Bland. *A Budgeting Guide for Local Government.* 3rd or 4th Edition. Washington DC: ICMA Publications. [Either 3rd or 4th edition is fine.] Chapters are available on Canvas from previous remote versions of this class.
    o Unfortunately, there is not a digital copy of this textbook available.
    o Textbooks may be purchased online through UODuckStore.com; print materials will be shipped free within the United States to UO students.
    o I have requested that the book be placed on Course Reserve at UO Knight Library.
- All readings are required readings unless otherwise noted and should be read prior to that day's lecture/discussion.
- Additional readings and resources will be available on Canvas through Modules. See course schedule on page 10-11 of this syllabus for a complete list of course readings and materials. Use this schedule to follow along with the Modules on Canvas.

Assignments and Course Grades
The course grade will be based on the following components (detailed descriptions will be posted on Canvas and discussed in class when assigned)

Course Engagement	**5%**
Reference Jurisdiction Pop-up Discussions	**5%**
Quizzes	**25%**

There will be Weekly Canvas Quizzes in Weeks 2-8. The five highest scores count towards your grade. You can skip or drop two.

Individual Written Assignment	**30%**
1) *Fiscal Provisions – Individual Budget Profile (due Oct 23)*	*20%*
2) *Case Study Assignment (due Nov 13)*	*10%*
Applied Project (Oral and Written)	**35%**
1) *Draft Outline (due Nov 4)*	*2.5%*
2) *Draft Report (due Nov 18)*	*2.5%*
3) *Final Presentation (Nov 29 or Dec 1)*	*10%*
4) *Final Project (Dec 6)*	*20%*

I grade all assignments via Canvas and typically provide feedback on assignments within 10 days.

Barring a specific need for adjustment, quizzes are always due by Friday evening at 11:59 PM and other written assignments are almost always due Sundays at 11:59pm—I hope this regular deadline simplifies what you need to keep in mind about the routine of the course.

All written and group assignments will be submitted electronically on Canvas. If you have technical issues submitting your assignment, take a screen-shot of your computer screen displaying the error, email me immediately and attach the screen-shot and the assignment to the email.

Class engagement
This class is structured to encourage student participation through class discussion and break out activities. I will cover a lot of content and the easiest way to consume that information is to be present.. Students are expected to have obtained, read, and retained the readings for each class and to come to class prepared to discuss content and implications of the readings. You are expected to participate in class discussion raising questions related to the readings and topics during class and/or by posting relevant content (including discussion topics, images and links) to general Canvas discussion boards. See page 15 for detailed explanation of expectations for engagement.

Reference Jurisdiction
Each student will select a "reference jurisdiction" for in-depth analysis and discussion throughout the term. You will be asked to research various financing mechanisms and aspects of local budgeting, as described in the course schedule and bring this information to class discussions. This jurisdiction will also be used for assignment 1 and 2. I recommend looking at the quality of the website before deciding on a jurisdiction.   I will ask you to report your preference for reference jurisdictions on the beginning of course survey and assign them with group project team assignments. You are expected to provide background information about your reference jurisdiction and participate in class discussions.

 Explanation of Grading System [See Rubrics on Canvas]

100	A+	85-89	B+	70-74	C+	55-59	D+	<45	F
95-99	A	80-84	B	65-69	C	50-54	D		
90-94	A-	75-79	B-	60-64	C-	45-49	D-		

- A+ signifies that the student clearly exceeds an exceptional level of achievement and complete mastery of all material. This is an exceedingly rare grade.
- A signifies an exceptional level of achievement and superb command of the material. Demonstrates higher level thinking and mastery of subject
- A- signifies a very good level of achievement and understanding of the material with some areas of potential improvement and mastery.
- B+ signifies an average level of achievement with adequate professional proficiency.
- B signifies a slightly below average achievement in relation to professional proficiency; the student has understood the information, but there are gaps in their knowledge and understanding.
- B– signifies that the student has not obtained professional proficiency of the subject material and there is significant room for improvement. While a B- allows the student to pass the class, a student with an overall GPA of a B- is not in good standing.
- C+ or lower signifies unacceptable work for graduate level or professionals. Significant deficiencies in assignment or knowledge.
- D or lower is not a passing grade and student does not earn credit
- P/NP: for a passing grade the student must achieve the equivalent of B- or better

Note that I round at 0.5.

Course Workload
A general rule of thumb for the expected workload for a graduate level class is approximately 3-4 hours/week per credit hour. Thus, a 4 credit course will require approximately 12-16 hours of effort per week. Our class meets for 3 hours each week, so students should expect to spend an additional 9 to 13 hours per week studying for this course. Assignments

will be time consuming, so I recommend that you start far in advance of assignment deadlines when I post the assignment on Canvas.

Classroom Behaviors
All members of the class (both students and instructor(s) can expect to:
1. Participate and Contribute: Students are expected to participate by sharing ideas and contributing to the collective learning environment. This entails preparing, following instructions, and engaging respectfully and thoughtfully with others. Together, we will establish more specific participation guidelines and criteria for contributions in our first weeks of the term.
2. Expect and Respect Diversity: All classes at the University of Oregon welcome and respect diverse experiences, perspectives, and approaches. What is not welcome are behaviors or contributions that undermine, demean, or marginalize others based on race, ethnicity, gender, sex, age, sexual orientation, religion, ability, or socioeconomic status. We will value differences and communicate disagreements with respect. We may establish more specific guidelines and protocols to ensure inclusion and equity for all members of our learning community.
3. Help Everyone Learn: Our goal is to learn together by learning from one another. As we move forward learning during this challenging time, it is important that we work together and build on our strengths. We are returning with a range of feelings about and comfort with being in person, and this means we need to be patient with each other, identify ways we can assist others, and be open-minded to receiving help and feedback from others. No one should hesitate to contact me to ask for assistance or offer suggestions that might help us learn better.

Language or action that is abusive or discriminatory will not be tolerated and is against the University Student Code of Conduct policies. Class rosters are provided to instructors with students' legal names. Please let us know if the name or pronouns we have for you are not accurate. It is important to me that I address you properly.

Course Policies
Late Assignment Policy
All assignments will be submitted electronically on Canvas. No hard copies are requested. If you need an extension, please reach out to me as soon as you think you'll need one. If you need help, reach out to me as soon as you need it and we can collectively work on a plan for getting your assignments submitted. If you submit an assignment late without requesting an extension, late assignments ten percent for every day (24-hour period) they are late. **Assignments submitted more than 5 minutes past the deadline will be graded as late.** Late quizzes are not accepted – instead, you will be able to drop or skip two quizzes.

Accommodations for Religious Observances
The University of Oregon respects the right of all students to observe their religious holidays, and will make reasonable accommodations, upon request, for these observances. If you need to be absent from a class period this term because of a religious obligation or observance, please fill out the Student Religious Accommodation Request fillable PDF form and send it to me within the first weeks of the course so we can make arrangements in advance.

Attendance and Missed Class Policy
Students are expected to attend and actively engage in class. Engagement counts for 5 percent of students' grades. You are responsible for all content missed, including any assignments, knowledge or skills covered or assigned in missed class(es.) You can miss **three classes** (or substitute discussion posts) for any reason without it affecting your grade. Per UO Policy, I do not distinguish between excused and unexcused absences. If you miss more than three class sessions, I will deduct a point per each missed session from your final grade. See more in UO policy: https://provost.uoregon.edu/course-attendance-and-engagement-policy.

If students let me know in advance that they will be missing class, I will make lecture recordings available directly to these students after class and provide options for remote participation as appropriate. Slide decks will always be

available on Canvas after class. Note that federal privacy law (FERPA) restricts the sharing of recordings that identify students outside this class. Please note that recording or sharing the recordings I make without written permission from me is also a violation of the Student Conduct Code.

Incomplete Policy
Please refer to UO Policy: https://provost.uoregon.edu/grades-incompletes-policy

Academic Disruption
In the event of a campus emergency that disrupts academic activities, course requirements, deadlines, and grading percentages are subject to change. Information about changes in this course will be communicated as soon as possible by email, and on Canvas. If we are not able to meet face-to-face, students should immediately log onto Canvas and read any announcements and/or access alternative assignments

We know our UO community will still be navigating COVID-19, and some students will need to use some of their four absences to isolate and rest if they get COVID. I made my absence policy with this in mind, so please use your absences with care so they're there for you if you need them. Students with COVID are encouraged to seek guidance and resources at UO's COVID-19 Safety Resources webpage.

Academic Integrity
You are always expected to do your own work. Copying content from other students and submitting it as your own work is grounds for failing the class. Sharing quiz questions or answers with classmates is considered academic misconduct. The University Student Conduct Code defines academic misconduct, which includes unauthorized help on assignments and examinations and the use of sources without acknowledgment. Academic misconduct is prohibited at UO.

For example, students should not give or receive (or attempt to give or receive) unauthorized help on assignments or quizzes without express permission from the instructor. Students are allowed to talk with classmates about research on written assignments and will be expected to collaborate on group assignments. Quizzes will be administered on Canvas and will be open for a designated window and must be completed within allocated time. Canvas will automatically vary the questions you receive. I will adjust times to support students with accommodations AEC. I have designed quizzes with the expectation that you have access to course materials and the internet. I am looking for evidence of critical thinking and applying concepts rather than regurgitating definitions. I will ask you to certify that quizzes are your own work. If a technological glitch disrupts your quiz, don't panic. Take a photo to document the error message you're receiving and then email me.

I will report all suspected cases of academic misconduct to the Office of Student Conduct and Community Standards. If you do not adhere to these expectations regarding academic integrity, you will receive a failing grade for this course.

Plagiarism
Students should properly acknowledge and document all sources of information (e.g. quotations, paraphrases, ideas) and use only the sources and resources authorized by the instructor. I reserve the right to evaluate your submissions using plagiarism software. If there is any question about whether an act constitutes academic misconduct, it is the student's obligation to clarify the question with the instructor before committing or attempting to commit the act. Additional information about a common form of academic misconduct, plagiarism, is available at: http://library.uoregon.edu/guides/plagiarism/students/index.html.

How to Avoid Plagiarizing
When directly quoting another author, the writer must:
- Accurately quote the original author's words.
- Enclose the quotation within quotation marks.
- Follow quotation with in-text citation [e.g., (p. 276)], the format of an in-text citation varies by citation style.

- Introduce the quotation with a 'signal phrase' (whether you are required to use a signal phrase or not varies by citation style).
- A list of references with full citation information is also required at the end of the paper. For more information on humanities or social sciences citation manuals see: http://libweb.uoregon.edu/guides/citing/index.html

When paraphrasing another author, the writer must:
- Use words or have a sentence structure different from the original work, while maintaining the gist of the original author's idea. Paraphrasing or summarizing doesn't mean just changing a couple of words from the original work.
- Acknowledge the source through in-text citations immediately following the paraphrase.

Encouraging Inclusive Learning Environments
The University of Oregon is working to create more inclusive learning environments, including for students who identify as having a disability. At UO, 10% of students use the Accessible Education Center (AEC) and nationally an estimated 20% of undergraduates identify as having a disability. If there are aspects of the instruction or design of this course that result in disability-related barriers to your participation, please contact me—your success matters.

You are also encouraged to contact the Accessible Education Center in 164 Oregon Hall at 541-346-1155 or uoaec@uoregon.edu. The AEC offers a wide range of support services including note-taking, testing services, sign language interpretation and adaptive technology.

Prohibited Discrimination and Harassment Reporting
Any student who has experienced sexual assault, relationship violence, sex or gender-based bullying, stalking, and/or sexual harassment may seek resources and help at safe.uoregon.edu. To get help by phone, a student can also call either the UO's 24-hour hotline at 541-346-SAFE [7244], or the non-confidential Title IX Coordinator/OICRC at 541-346-3123. I am a student-directed employee. For information about my reporting obligations as an employee, please see Employee Reporting Obligations on the Office of Investigations and Civil Rights Compliance (OICRC) website. I am a student-directed employee. Students experiencing any form of prohibited discrimination or harassment, including sex or gender-based violence, may seek information and resources at safe.uoregon.edu, respect.uoregon.edu, or investigations.uoregon.edu or contact the non-confidential Title IX office/Office of Civil Rights Compliance (541-346-3123), or Dean of Students offices (541-346-3216), or call the 24-7 hotline 541-346-SAFE for help. I am also a mandatory reporter of child abuse. Please find more information at Mandatory Reporting of Child Abuse and Neglect

Equity and Inclusion Statement
As part of the PPPM Equity and Inclusion Initiative, instructors are encouraged to describe how a course relates to issues of equity and inclusion. Equity and inclusion are topics that cut across issues of planning, public policy and management. The content of this course relates to equity and inclusion in discussing issues of the allocation of resources and services within communities, how revenue sources impact socioeconomic differently, and who is included in decisions about revenues and expenditures within communities. Budgets reflect priorities in communities, and we will discuss how issues of power and privilege in society affects budget allocations. Capital budgeting raises questions about intergenerational equity in who pays for facilities with long lifespans.   Topics related to economic development raise questions about who benefits and who loses when communities choose different types of economic development strategies.

Inclusion Statement
The College of Design is a community that values inclusion. We are committed to equal opportunities for all faculty, staff and students to develop individually, professionally, and academically regardless of ethnicity, heritage, gender, sexual orientation, ability, socio-economic standing, cultural beliefs and traditions. We are dedicated to an environment that is inclusive and fosters awareness, understanding, and respect for diversity. If you feel excluded or threatened, please contact your instructor and/or department head.

Sustainable City Year Program

  The Sustainable City Year Program (SCYP), a program through the University of Oregon Sustainable Cities Institute (SCI) links the students of the University of Oregon with an Oregon city or public agency for an entire academic year. For the 2019-2020 academic year, the University of Oregon is partnering with **Sisters, OR**

  Each year, the partner receives assistance with their sustainability goals through the work of student classes across the University. In a typical year, **400+ students** from **10-12 disciplines** across **15-25 classes** might work on **20-30 partner-directed projects,** devoting **50,000+ hours of work to helping a local entity** transition to a more sustainable future.

  For interested students, there is an opportunity at the end of the term to work for SCI as a paid report writer and to compile the work of the class into a single, final report to be given to Sisters. Class instructors will recommend a student report writer – please reach out to them if you are interested in this position.

  The University of Oregon Libraries will prepare a research guide for SCYP students. If you have any further questions, please contact SCYP Director, Megan Banks, at mbanks@uoregon.edu, (541) 346-6395.

Policy Lab

  The Oregon Policy Lab is a partnership between Lane County and the University of Oregon that began in 2018. This unique partnership represents a significant undertaking in local government policy research mechanisms. The Policy Lab seeks to leverage the immense talent of the students and faculty of the University of Oregon to provide Lane County decision-makers with the tools to assess and address complex policy challenges while providing valuable real-world experience for students and research opportunities for faculty.

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Schedule of Readings and Assignments (SUBJECT TO CHANGE- CHECK CANVAS FOR UPDATES)

	Date	Topic, Readings (to be completed by this day in class), Reference Jurisdiction	Deadlines/ Course Discussion
Week 1	27-Sept	**Syllabus; Framework for Public Budgeting**	
		Textbook: Bland ch 1	Background survey (due Wednesday, October 5)
	29-Sept	**The Context of Local Government Finance; Structure and Function of Governments; Overview of Budget Process and Fiscal Provisions**	
		Textbook: Bland ch 1	
Week 2	4-Oct	**Revenue Choices**	
		Textbook: Bland ch 2	
		Reference Jurisdiction: See Operating Budget: What are primary revenue categories? See governing statutes: what are legal revenue choices?	
	6-Oct	**Basics of Operating Budgets**	
		Textbook: Bland ch 7	W2 Quiz
		Reference Jurisdiction: Budget Process; Annual Budget Document	
Week 3	11-Oct	**Applied Project Class Visits from Lane County & Sisters**	
	13-Oct	**Basics of Capital Budgeting**	
		Textbook: Bland ch 11	*Group Discussion on Revenue Sources* W3 Quiz
		Reference Jurisdiction: Capital Budget; Capital Improvement Program	
Week 4	18-Oct	**Basics of Budgeting & Budget Preparation**	*Group Discussion on Budget Process*
		Textbook: Bland ch. 7 & 8	
		Reference Jurisdiction: Budget Process (see Operating Budget and/or website); See Municode or LexisNexis for governing code or statutes;	
	20-Oct	**Budget Preparation & Budget Implementation and Accounting**	
		Textbook: Bland ch. 9 and 10	W4 Quiz *; **Assignment 1 due October 23***
		Reference Jurisdiction: Budget Process (see Operating Budget and/or website); Fiscal Policy	
Week 5	25- Oct	**Property Tax**	
		Textbook: Bland ch 3	
		Reference Jurisdiction: Property Tax Assessment System (see County Assessor's Office website); Watch Property Tax Fairy: https://www.youtube.com/watch?v=Fo_hSySAC2A	
	27-Oct	**Consumption and Income Tax ***	
		Textbook: Bland ch 4	
		Reference Jurisdiction: See operating budget: Does jurisdiction use local option consumption (sales) or income taxes?	*Group Discussion on Consumption Taxes;* W5 Quiz

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	Date	Topic, Readings, Reference Jurisdiction	Deadlines/ Course Discussion
Week 6	1-Nov	**Non-Tax Revenue Sources: Service Charges & Impact Fees *** *Textbook: Bland ch 5* *Canvas: Duncan & Associates," National Impact Fee Survey;" Ross & Thorpe: "Impact Fee: A Practical Guide."* *Reference Jurisdiction: See operating budget: what portion of revenue is derived from service charges; Impact Fees; Service Development Charges*	*Group Discussion on Service Charges and Impact Fees*
	3-Nov	**Applied project group meetings * - NO LECTURE CLASS** *(no class - instructor at conference)*	W6 Quiz*; Group Project Outline Due November 4 at 11:59 pm*
Week 7	8-Nov	**Special Districts*** Watch John Oliver on Special Districts https://www.youtube.com/watch?v=3saU5racsGE	
	10-Nov	**Capital Budgeting** *Textbook Readings: Bland ch. 11;* *Canvas: Vogt(Capital Budgeting) ch. 5-6*	*Group Discussion on Capital Budgeting ;*
		Reference Jurisdiction: Capital Budget; Capital Improvement Program	W7 Quiz: **Assignment 2 due November 13 at 11:59 pm;**
Week 8	15- Nov	**Infrastructure Finance *** Watch: John Oliver on Infrastructure - https://www.youtube.com/watch?v=Wpzvaqypav8 *Canvas: Vogt(Capital Budgeting) ch. 5-6* *Reference Jurisdiction: Capital Budget; Capital Improvement Program*	
	17-Nov	**Economic Development *** *Textbook: Bland ch. 6* *Watch: John Oliver on Economic Development https://www.youtube.com/watch?v=8bl19RoR7lc and Stadiums https://www.youtube.com/watch?v=xcwJt4bcnXs* *Reference Jurisdiction: economic development goals and strategies; What are the special districts present in your jurisdictions? Does your jurisdiction have a Business Improvement District or Parks District?*	*Group Discussion on Economic Development;* W8 Quiz*; Group Project Draft due November 18 at 11:59 PM;*
Week 9	22-Nov	**Debt and Bonds *** *Canvas: Vogt(Capital Budgeting) ch 7-8* *Reference Jurisdiction: Debt Policy; Bonding authority and debt capacity/ratios; List of active bonds; Bond rating*	*Group Discussion on Debt and Bonds*
	24-Nov	**No class. UO Holiday**	
Week 10	29-Nov	**Final Group Presentations* OR course wrap up**	*Oral Presentations*
	1-Dec	**Final Group Presentations* OR course wrap up**	
Week 11	*	**Final Group Project due Monday, December 6 at 2:30 PM**	

* We will have longer classes on days (through 3:50) marked with asterisks to allow for group project work time during class. I may add additional longer sessions as needed.

Professional Writing
Writing is a very important skill for public administration and planning. It is one of the most common forms of communication and employers always emphasize that they want people who can communicate effectively.

Writing Resources
Writing book: Consult *The Elements of Style* by William Strunk (reprinted numerous times), which is available on line (http://www.bartleby.com/141/). In particular, it is always helpful to review his section on "The Elementary Rules of Composition."

Research help: The Knight Library is a good place to start for research. In addition to reference librarians, they have databases that allow you to search a topic across thousands of journals at once. Go to the library web page, search for "articles" and search across all fields or search by a subject such as planning. You can also search through sites like Google Scholar to find information from a range of sources. If you access the site through a university server (or use VPN) you will be able to access far more articles than if you search from your home computer.

Writing Criteria
The UO PPPM faculty emphasize some common criteria for all written assignments and material. These criteria can also affect your content, because your good work may not be clearly communicated. The matrix below will be used to evaluate writing for all assignments. Be sure to also review the specific content criteria for each assignment.

General Writing Guidance (Adapted from Maryland School of Public Policy Writing Criteria)
- *Structure:* You should always have some sort of introduction (background, context) and some sort of conclusion (executive summary, findings, recommendation, etc.)
  - Your conclusion may appear on the first page, but you should still illustrate some attempt to synthesize information
  - Distinguish among information, findings, conclusions and recommendations. Information transmits facts or other matters useful to the reader. Findings summarize salient facts. Conclusions interpret the facts. Recommendations suggest what to do about them. Recommendations should be specific and implementable. They should describe players, timing and the result being sought. Avoid expressions of personal opinion not based on factual analysis.
- *Conciseness is important:* Simplify word choice and sentence structure. Make your point only once. Eliminate compound subjects, verbs, objects, and modifiers, e.g., "determination and perseverance," "convincing and persuasive."
- *Audience is important:* The readers *are* the audience, so write to their perspective. The audience may only be the instructor, but sometimes students are told to write for other readers. Keep in mind that a written document may find unanticipated audiences, so choose wording carefully.
- *Person and voice:* you should use third person and active voice. Passive voice can be useful in some situations, but it may be insufficiently precise.
- *Tone:* A document should be objective and professional. It should not be aggressive, preachy or "know it all." A "red flag" is a term which can incite undue emotion in the reader, so search for red flags. Avoid expressions which reflect opinion. Don't use, "I feel," "I think" or "I believe." Orient your writing to the expectations of the reader.
- *References and Citations:* Many approaches to citations are acceptable. Footnotes can be used. Bibliographical references inserted in the text in parenthesis after the quotation also work. Whatever method you adopt, the reader must be able to access the reference from the information provided.
  - Paraphrased ideas can be cited without quotation marks, but must be sourced. Any two or more consecutive words taken from a source should be put in quotes. Use the author's name in the sentence leading up to the quote, in a footnote or parenthetical citation. Avoid plagiarism; give attribution when using someone else's words or ideas.
  - Plagiarism is easy to identify electronically.
  - In the text, book titles are normally underlined and articles are referred to in quotation marks.
  - Be sure the source is credible. Do not use Wikipedia for that purpose.

- *Proofread, proofread, proofread.* Allow time for editing.   I recommend reading your document out loud to expose awkward wording like run-on or choppy sentences.

Formatting
- Memos should be single-spaced; research papers and reports should be double-spaced
- Content matters more than a flashy template (but templates in Word are appropriate)
- Always include page numbers
- Use consistent significant figures (and 4 decimal places are not necessary)
- Headings and subheadings are very helpful
    - When a major new section begins, e.g., "Section 2: Methodology," a lead paragraph should state what the section is going to do, why that is relevant, and how the section is organized. Sub-headers do not need lead paragraphs.
    - Headers help the reader scan the document. Styles should be consistent in descending order of importance. Never end a page with a free-standing header
- Tables, charts, maps and other images should be boxed. They are usually separately labeled and numbered, but it is permissible to call all the images "exhibits" and use a single numbering system. Titles are normally centered above the boxed image with a double space between them and the box. Keep images large enough to read easily. If necessary, put them on the page after their text reference. They must be introduced in the text before they are displayed.
- Do not divide any exhibit between two pages unless it is longer than a page. If it is longer than a page, the row which explains the content of the columns should be reiterated on the second page.
- Tables and figures should have captions and sources and should be clean and legible. If copying and pasting figures looks fuzzy, then re-create the table or figure.
- Be consistent with the format for images. Don't use titles inside the box for some exhibits and titles above the box for others. Text is usually left justified; numbers should be right justified. Sometimes the column or row titles are centered and/or bolded. Put the source below the boxed image on the left single spaced. Images should not be separated from their titles. Titles separated from their images and headers left at the bottom of the page are called "widows."

Common Grammatical Mistakes

Proofreading. The last phase of editing is proofreading. This can be done in stages. Look for and delete every unnecessary word. Check for your personal weaknesses such as switching tenses, failing to achieve verb agreement or improperly using capitalization. Look for mistakes in spelling and grammar. Do not rely on grammar or spell check alone, although the Find and Replace function will locate and remove double periods and other easy to miss errors. Such errors may seem minor, but they detract from the message and undermine credibility. Some common errors are:

1. Using singular verbs with collective nouns
2. Improperly selecting a pronoun as an antecedent, e.g., using "it" as a subject, even though the antecedent is not established in the previous sentence. (It would be improper to say, "The world is getting hotter and dryer. It needs to change." – Is it the climate or the world that needs to be changed?)
3. Failing to write out the numbers one through nine – only 10 and above are numeric;
4. Beginning a sentence with a number or an acronym rather than spelling it out;
5. Failing to ensure agreement between the subject and verb so that a singular subject gets a singular verb and a plural subject gets a plural verb;
6. Using tenses inconsistently, i.e. moving from present to past or future tense with no obvious rationale. Stay in the present tense unless referring to a specific past or future situation.
7. Choosing prepositions incorrectly, e.g. use "between" for a comparison between two things and "among" for three or more (When in doubt, consult a dictionary.); and
8. Neglecting parallelism, i.e., when doing a numbered or bulleted list, use the same grammatical construct throughout, so, for example, if the first bullet leads with a verb, a noun or a sentence, all subsequent bullets should be structured the same way.

Grading Rubric Guidance (will vary by specific assignment – see Canvas Rubrics for point values and detailed descriptions)

Criteria
Addressing each portion of assignment • Will vary (see Canvas rubrics)
Providing adequate justification • Use of literature to present issues and arguments • Development of a coherent argument or reasoned position • Exhibition of higher-level thinking, synthesis and argumentation
Writing (see below) • Clearly structured and organized • Professional tone • Grammar, referencing & presentation

WRITING: Detailed Feedback
Logical structure*: Can your reader follow presentation of information?* • Introductory section to orient the reader to the purpose of the document • Clear sequence of sections: logical order for writing task • Clear structure to sections • Uses subheadings effectively—reader can easily find key information • Uses paragraphs to support structure • Clear topic sentences • Links between paragraphs • Links within sections
Professional approach: *May not apply for each assignment.* • Objective paper avoids bias and prejudice • Assertions supported by evidence (references, clear information, citations) and not just opinion • Uses a range of high quality sources • Appropriate use of active and passive voice • Awareness of audience: avoids slang, jargon and informal language • Coherence
Grammar: *Errors can raise questions about sloppiness* • Noun verb agreement • Correct use of tense • Complete sentences • Appropriate punctuation • No run on sentences • No spelling errors or typos • Other grammar issues
Referencing: *Provide support for assertions in accepted referencing style.* • In text references (author date, page) or footnotes • Reference list (or footnotes) using proper citation format
Professional Presentation • Don't overuse bullets • Professional format (page #s, clear print + graphics) • Free of handwritten edits • Use graphics to support text, but not replace it • Proofreading

Sample Memo

To: Decision maker

From: Your name

Date: Today's date

Re: Use this space to summarize your topic in **3-7 words**

Overview [you should change this heading as appropriate]

Use a section like this to explain the purpose of the memo and give an overview of the document. You may offer a brief preview of your conclusions or recommendations. For example:
This memo summarizes some of the strategies for organizing a professional memo. In the following sections…

Context / Background [you should change this heading as appropriate]

Use a section like this to set the context or give the background for your audience. You may need to remind them of the task, background or how it relates to decisions they have to make. For example:
At its June meeting, the UO Board of Trustees requested that the UO prepare a climate action plan. In response, the President appointed a Climate Action Team, and this memo summarizes its progress…and so forth

Information / Body [you should change this heading as appropriate]

Present your information here and organize your main section while following these basic rules:
- Keep it simple stupid (KISS): summarize the key points and highlights
- Your document should have a clear logic flow with well-connected points and themes
- If this section is long, use sub-headings
- Use paragraphs with a clear topic sentence for your main themes
- Use bullets and numbering when you are presenting lists (don't replace paragraphs with bullets)
- Use charts or graphs if they do a better job of presenting complex information

Findings / Conclusions / Recommendations/ Action Items [you should change this heading as appropriate]

This will vary a lot depending on the purpose, audience, and the task assigned to the memo writer. Memos are usually not opinion or advocacy documents, but rather findings based on supporting evidence.
No: Can you imagine a world where Oregon rivers are parched and the forests are burning…
No: I think climate change is really important so the university should…
Yes: Based on the information I have gathered, the major sources of university emissions are…
Yes: The climate action team is recommending several policy options for the university to consider…

References

Use a standard reference system in your memo—either the author/date system (Daniels and Daniels 2003, 2-3) or a footnote system[1]. Include a reference list –OR–footnotes. Examples of both are listed below:

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[1] Daniels and Daniels. 2003. Environmental Planning Handbook. Chicago, IL: American Planning Association Press, pp. 2-3.

Assessment
Course Engagement
(5% of course grade)

Course engagement is interpreted broadly to include verbal and non-verbal ways of contributing to discussion inside and outside of class.

During Class
- Showing up to class
- Discussing content and implications of readings during class
- Asking questions during class

Outside of class
- Posting discussion topics, images and links to Canvas
- Responding to discussion topics raised in class or on Canvas
- Emailing or scheduling office hours to discuss class topics
- Asking questions before or after class

Reference Jurisdiction Pop-Up Assignments
(5% of course grade)

This portion of your grade relates to your contributions based on your external research on your reference jurisdiction to contribute to class discussions. You will also be expected to document and offer key policy and budget information during class discussions. Your contributions of budget information will be documented through a shared SharePoint that will allow us to document and compare across cities throughout the term.

Fulfilling the reference jurisdiction component of your grade includes:

- Offering examples from reference jurisdiction in class related to class topic (as described in schedule of readings and assignments)
- Participating in scheduled small group discussions on class topics and contributing to the SharePoint document (during Small Group Discussions)