

School of Planning, Public Policy and Management



University of Oregon
School of Planning, Public Policy and Management
PPPM 629: Public Budget Administration
Fall 2021 (CRN: 15267) – 4 credits

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Office Hours: M 3-5 & Th 12:30-2. Sign up here:
<https://rebecca-lewis.youcanbook.me/>
Class Time: T/Th 2-3:50 * note – will usually end
at 3:20 PM
Room: Allen Hall 101

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 finance. Through a series of applied assignments, students will develop proficiency in public sector budgeting and finance. 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.

Course Modality

This is an in-person course: that means that, unlike asynchronous online/WEB courses, we will meet during scheduled class meeting times in Allen 101. I will accommodate illness and absences as described below. If you need additional flexibility UO encourages you to consider WEB courses. If you need accommodation related to a medical or other disability, you can set those up through AEC (<https://aec.uoregon.edu>)

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Course Website

While our classes will be in person, Canvas will still be an important part of our course, and the place to go for course information and engagement outside of class time. 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 is 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

Communication

How can 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.
- When giving feedback on assignments, I do so in Canvas, and turnaround time for feedback is generally 7-10 days.

Please check Canvas prior to attending class—if in 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 encourage you to email me with questions on the syllabus, assignments, readings, etc. 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. I am often available on Microsoft Teams as well. If you see me as online and available, feel free to send me a chat or message there. *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 a true pleasure—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 office hours each week from 3-5 on Monday and 12:30-2 on Thursdays. You can make an appointment (<https://rebecca-lewis.youcanbook.me/>) or show up to my office (247A Hendricks.) I am happy to meet

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remotely or in person. I welcome meetings outside my regular office hours, too, knowing that there is considerable uncertainty in all of our lives right now. 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. Some students have never been to an instructor's office hours—if that is you, please change that this term by attending! Feel free to come with another peer as well if that is useful for you. Regardless of the format, I look forward to connecting!

Flexibility in an Uncertain Time

As the university community adjusts to returning to campus in the context of the COVID-19 pandemic, course requirements, deadlines, and grading percentages are subject to change. I will check-in with you frequently about how the class is going to get your feedback on how the learning environment is working for you. I will be mindful of potential impacts COVID-19 (and other current events) may be having on you. During this unusual time, I encourage you to talk with me about what you are experiencing so we can work together to help you succeed in this course.

As the university community continues to balance learning and health during the COVID-19 pandemic, it is essential that each of us exercises care by doing [symptom self-checks](#), and by not attending class when ill, or when you or someone you live with must quarantine.

I will record lecture-based content and will provide opportunities for students in quarantine to participate remotely as needed. I will strive to record the parts of our class sessions when I am primarily sharing information, and when we as a class we are applying it, and will post those recordings in weekly Canvas modules. I will always share my PowerPoint slide deck on Canvas after class.

As recording our time together can sometimes change how students feel about participation, I will let you know when we are recording. 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.

Participation:

Though attendance and participation account for 5 percent of students' grades, I will offer make-up activities in lieu of attending class (discussion board posts).

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.]
 - Unfortunately, there is not a digital copy of this textbook available.
 - Textbooks may be purchased online through [UODuckStore.com](https://uoduckstore.com); print materials will be shipped free within the United States to UO students.
- 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 11-12 of this syllabus for a complete list of course readings and materials. Use this schedule to follow along with the Modules on Canvas.

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Assignments and Course Grades

The course grade will be based on the following components (further described on pages 17-24 at the end of the syllabus.)

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) <i>Fiscal Provisions – Individual Budget Profile (due Oct 24)</i>	20%
2) <i>Case Study Assignment (due Nov 4)</i>	10%
Applied Project (Oral and Written)	35%
1) <i>Draft Outline (due Oct 31)</i>	2.5%
2) <i>Draft Report (due Nov 21)</i>	2.5%
3) <i>Final Presentation (Nov 30 or Dec 2)</i>	10%
4) <i>Final Project (Dec 6)</i>	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 8 PM and other written assignments are 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. If you are unable to attend class, you can contribute the Weekly Discussion board post (see below) in lieu of attending and participating in class. 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 17 for detailed explanation of expectations for participation.

Reference Jurisdiction

Each student will select a “reference jurisdiction” for in-depth analysis and discussion throughout the term. Students will be asked to share current events from reference jurisdictions. You will also be asked to research various financing mechanisms and aspects of local budgeting, as described in the course schedule. This jurisdiction will also be used for assignment 1. You can also pick a city that you could use in assignment 2 to stick with one jurisdiction for both assignments. I recommend looking at the quality of the website and accessibility of the newspaper before deciding on a jurisdiction. I will ask you to report your preference for reference jurisdictions on the beginning of year survey and assign them with group project team assignments. You are also expected to discuss current events and background information about your reference jurisdiction and participate in class discussions.

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Explanation of Grading System [See Rubrics on Canvas]

100	A+
95-99	A
90-94	A-

85-89	B+
80-84	B
75-79	B-

70-74	C+
65-69	C
60-64	C-

55-59	D+
50-54	D
45-49	D-

<45	F

- 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.

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.

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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 us to address you properly.

Classroom Rules

Eating and drinking in classrooms is not currently allowed at UO. We ask that class members step outside when they need to eat or drink, take medication, or anything else that necessitates taking off masks. Please feel free to do this whenever you need to—there is no need to ask permission around this. Students who may have mobility issues that make this guidance challenging should contact me.

In addition, being back in person may feel more challenging for some of us, for a variety of reasons. If you need to step outside of the room momentarily to take care of your own physical or mental needs, please feel warmly welcome to do so.

Course Policies

Late Assignment Policy

All assignments will be submitted electronically. 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.**

Accommodations for Religious Holidays

- Let me know of any classes or assignments overlap with religious festivals (Yom Kippur, Eid, Diwali, etc.) that are not university holidays, and I am happy to find an alternative.
- Let me know if you need any accommodations in class on a festival day (e.g., if you are fasting).

Missed Class Policy

You are responsible for all content missed, including any assignments, knowledge or skills covered or assigned in missed class(es.) Please consult Zoom video recordings or ask classmates for class notes. If you miss a class, you can make up for attendance to that class session by posting a discussion board post that poses two things you learned from watching lecture + one question from readings or lecture. You can miss two classes (or substitute discussion posts) for any reason without it affecting your grade. If you miss more than two class sessions (or substitute discussion posts), I will deduct a point per each missed session from your final grade.

Incomplete Policy

Students are expected to behave in a professional manner and to turn in all materials at the designated time. In accordance with university regulations, an incomplete will only be given when "the quality of work is satisfactory but a minor yet essential requirement of the course has not been completed for reasons acceptable to the instructor."

Important Academic Information

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. Students are also expected to continue coursework as outlined in this syllabus or other instructions on Canvas. In the event that the instructor of this course has to quarantine, this course may be taught online during that time.

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COVID Containment Plan

As the University of Oregon returns to in-person instruction, the key to keeping our community healthy and safe involves **prevention, containment, and support**. Here is information critical to how the UO is responding to COVID-19.

- **Prevention:** To prevent or reduce the spread of COVID-19 in classrooms and on campus, all students and employees:
 - Must comply with [vaccination policy](#)
 - Must [wear face coverings](#) in all indoor spaces on UO campus
 - Complete weekly [testing](#) if not fully vaccinated or exempted
 - [Wash hands](#) frequently and practice social distancing when possible
 - Complete daily [self-checks](#)
 - Stay home/do not come to campus if feeling [symptomatic](#)
 - Complete the UO [COVID-19 case and contact reporting form](#) if you test positive or have been in close contact with a confirmed or presumptive case.
- **Containment:** If a student in class tests positive for COVID-19, all relevant classes will be notified via an email by the Corona Corps Care Team with instructions for students and staff based on their vaccination status. Specifically:
 - *Vaccinated/Asymptomatic students:* Quarantine not required, but daily self-monitoring before coming on campus advised; sign up for testing 3-5 days after notification through [MAP](#)
 - *Unvaccinated or partially vaccinated students:* 14-day quarantine advised – do not come to class – and sign up for testing 3-5 days after notification through [MAP](#), if asymptomatic, or through University Health Services (541-346-2770) or your primary care provider, if symptomatic.
 - *Symptomatic students:* stay home (do not come to class/campus), complete the online [case and contact form](#), and contact University Health Services (541-346-2770) or your primary care provide to arrange for immediate COVID-19 testing.

Students identified as close contacts of a positive case will be contacted by the Corona Corps Care Team (541-346-2292).

- **Support:** The following resources are available to you as a student.
 - [University Health Services](#) or call (541) 346-2770
 - [University Counseling Center](#) or call (541) 346-3277 or (541) 346-3227 (after hrs.)
 - [MAP Covid-19 Testing](#)
 - [Corona Corps](#) or call (541) 346-2292
 - [Academic Advising](#) or call (541) 346-3211
 - [Dean of Students](#) or call (541)-346-3216

Good Classroom Citizenship

- Wear your mask over your nose and mouth and make sure it fits you well
- Stay home if you're sick
- Get to know your neighbors in class, and let them know if you test positive
- Get tested regularly
- Watch for signs and symptoms with the daily symptom self-check
- Wash your hands frequently or use hand sanitizer
- Complete the UO COVID-19 [case and contact reporting form](#) if you test positive or are a close contact of someone who tests positive.
- Leave the classroom to eat and drink

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

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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 or call 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 and the success of your peers 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.

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Your Well-Being

Life at the university can be very complicated. Students often feel overwhelmed or stressed, experience anxiety or depression, struggle with relationships, or just need help navigating challenges in their life. If you're facing such challenges, you don't need to handle them on your own--there's help and support on campus.

As your instructor if I believe you may need additional support, I will express my concerns, the reasons for them, and refer you to resources that might be helpful. It is not my intention to know the details of what might be bothering you, but simply to let you know I care and that help is available. Getting help is a courageous thing to do—for yourself and those you care about.

University Health Services help students cope with difficult emotions and life stressors. If you need general resources on coping with stress or want to talk with another student who has been in the same place as you, visit the Duck Nest (located in the EMU on the ground floor) and get help from one of the specially trained Peer Wellness Advocates. Find out more at health.uoregon.edu/ducknest.

University Counseling Services (UCS) has a team of dedicated staff members to support you with your concerns, many of whom can provide identity-based support. All clinical services are free and confidential. Find out more at counseling.uoregon.edu or by calling 541-346-3227 (anytime UCS is closed, the After-Hours Support and Crisis Line is available by calling this same number).

Basic Needs

Any student who has difficulty affording groceries or accessing sufficient food to eat every day, or who lacks a safe and stable place to live is urged to contact the Dean of Students Office (346-3216, 164 Oregon Hall) for support.

The [UO Basic Needs Resource Guide](#) includes resources for food, housing, healthcare, childcare, transportation, technology, finances, and legal support.

Your safety and well being impacts learning. Please contact resources that can help you to thrive and let me know if you need any help connecting.

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 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.

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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 **Hermiston, 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 Hermiston. 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 early 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. This class is partnering with the **Parks Division in Lane County**.

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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	28-Sep	Syllabus; Framework for Public Budgeting	
		<i>Textbook: Bland ch 1</i>	Background survey (due Sunday, October 3)
	30-Sep	The Context of Local Government Finance; Structure and Function of Governments; Overview of Budget Process and Fiscal Provisions	
<i>Textbook: Bland ch 1</i> <i>Reference Jurisdiction: See Municode or LexisNexis for governing code or statutes; examine budgeting process</i>			
Week 2	5-Oct	Revenue Choices and Alumni Panel	
		<i>Textbook: Bland ch 2</i> <i>Reference Jurisdiction: See Operating Budget: What are primary revenue categories? See governing statutes: what are legal revenue choices?</i>	
	7-Oct*	Group Discussion on Revenues + Special Districts Watch John Oliver on Special Districts https://www.youtube.com/watch?v=3saU5racsGE	W2 Quiz
Week 3	12-Oct	Basics of Operating Budgets + Group Discussion on Revenues	
		<i>Textbook: Bland ch 7</i> <i>Reference Jurisdiction: Budget Process; Annual Budget Document</i>	<i>Group Discussion on Revenue Sources;</i>
	14-Oct	SCYP Class Visit & Basics of Capital Budgeting	
<i>Textbook: Bland ch 11</i> <i>Reference Jurisdiction: Capital Budget; Capital Improvement Program</i>		W3 Quiz	
Week 4	19-Oct	Property Tax	
		<i>Textbook: Bland ch 3</i> <i>Reference Jurisdiction: Property Tax Assessment System (see County Assessor's Office website); Watch Property Tax Fairy: https://www.youtube.com/watch?v=Fo_hSySAC2A</i>	
	21-Oct	Consumption and Income Tax	
<i>Textbook: Bland ch 4</i> <i>Reference Jurisdiction: See operating budget: Does jurisdiction use local option consumption (sales) or income taxes?</i>		Group Discussion on Consumption Taxes; W4 Quiz ; Assignment 1 due October 24	
Week 5	26-Oct*	Non-Tax Revenue Sources: Service Charges & Impact Fees + Lane County Visit	
		<i>Textbook: Bland ch 5</i> <i>Canvas: Duncan & Associates, "National Impact Fee Survey;" Ross & Thorpe: "Impact Fee: A Practical Guide."</i>	Group Discussion on Service Charges and Impact Fees
		<i>Reference Jurisdiction: See operating budget: what portion of revenue is derived from service charges; Impact Fees; Service Development Charges</i>	
	28-Oct*	Basics of Budgeting & Budget Preparation	
<i>Textbook: Bland ch. 7 & 8</i> <i>Reference Jurisdiction: Budget Process (see Operating Budget and/or website)</i>		W5 Quiz ; SCYP Outline Due Oct 31	

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	Date	Topic, Readings, Reference Jurisdiction	Deadlines/ Course Discussion
Week 6	2-Nov	Budget Preparation & Budget Implementation and Accounting	
		<i>Textbook: Bland ch. 9 and 10</i>	
		<i>Reference Jurisdiction: Budget Process (see Operating Budget and/or website); Fiscal Policy</i>	
	4-Nov*	Economic Development	
<i>Textbook: Bland ch. 6</i>			
<i>Watch: John Oliver on Economic Development https://www.youtube.com/watch?v=8bl19RoR7lc and Stadiums https://www.youtube.com/watch?v=xcwJt4bcnXs</i>			
<i>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?</i>			
Week 7	9-Nov*	Capital Budgeting	Group Discussion on Capital Budgeting ;
		<i>Textbook Readings: Bland ch. 11;</i>	
		<i>Canvas: Vogt(Capital Budgeting) ch. 5-6</i>	
11-Nov	No Class – UO Holiday	W7 Quiz: Assignment 2 due November 14 at 11:59 pm;	
Week 8	16-Nov	Infrastructure Finance	
		<i>Watch: John Oliver on Infrastructure - https://www.youtube.com/watch?v=Wpzvagyypav8</i>	
		<i>Canvas: Vogt(Capital Budgeting) ch. 5-6</i>	
	<i>Reference Jurisdiction: Capital Budget; Capital Improvement Program</i>		
18-Nov*	Guest Speaker: Assistant Finance Director – City of Eugene (Vicki Silvers)	Group Project Draft due November 21 at 11:59 PM; W8 Quiz	
<i>No readings.</i>			
Week 9	23-Nov*	Debt and Bonds <i>Canvas: Vogt(Capital Budgeting) ch 7-8</i> <i>Reference Jurisdiction: Debt Policy; Bonding authority and debt capacity/ratios; List of active bonds; Bond rating</i>	Group Discussion on Debt and Bonds;
	25-Nov	No class. UO Holiday	
Week 10	30-Nov*	Final Group Presentations OR course wrap up	
	2-Dec*	Final Group Presentations	Oral Presentations
Week 11	Final 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 sessions as needed.

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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.

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- *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, e.g., “The company is opposed to immigration reform. It does (NOT they do) not want to lose American jobs to illegal immigrants.”
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. Using “they” for a singular person when gender is known. It is OK to use “they” or “one” if gender is unknown.
4. Failing to write out the numbers one through nine – only 10 and above are numeric;
5. Beginning a sentence with a number or an acronym rather than spelling it out;
6. 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;
7. 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.
8. 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
9. 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.

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Grading Rubric Example (will vary by specific assignment – see Canvas Rubrics)

Criteria	Unacceptable professional quality	Minimally acceptable professional quality	Adequate professional quality	Very good professional quality	Highest professional quality
EVALUATION					
Addressing each portion of assignment <ul style="list-style-type: none"> Will vary 					
Providing adequate justification <ul style="list-style-type: none"> 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) <ul style="list-style-type: none"> Clearly structured and organized Professional tone Grammar, referencing & presentation 					

WRITING: Detailed Feedback	Weaknesses or Deficiencies
Logical structure: <i>Can your reader follow presentation of information?</i> <ul style="list-style-type: none"> 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: <i>May not apply for each assignment.</i> <ul style="list-style-type: none"> 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: <i>Errors can raise questions about sloppiness</i> <ul style="list-style-type: none"> Noun verb agreement Correct use of tense Complete sentences Appropriate punctuation No run on sentences No spelling errors or typos Other grammar issues 	
Referencing: <i>Provide support for assertions in accepted referencing style.</i> <ul style="list-style-type: none"> In text references (author date, page) or footnotes Reference list (or footnotes) using proper citation format 	
Professional Presentation <ul style="list-style-type: none"> 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 system¹. Include a reference list –OR–footnotes. Examples of both are listed below:

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 OR adding a substitute discussion post on a class session you miss. (You do not need to do both for every class.)
 - You can skip two classes or substitute discussion posts for any reason. If you miss more than two (either classes or substitute activity), one point deducted from final grade for each.
 - Guidelines for substitute discussion board posts:
 1. Request class lecture recording from instructor.
 2. Watch the lecture.
 3. Add a discussion post to the Weekly Canvas Discussion that includes two things you learned from lecture and one question about the reading or discussion.
- 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 are not expected to contribute current events for each class but you should contribute at least 3 times throughout the term. You will also be expected to document and offer key policy and budget information during class discussions. Your contributions of current events and budget information will be documented through a shared Google Document that will allow us to document and compare across cities throughout the term.

Fulfilling the reference jurisdiction component of your grade includes:

- Discussing current events from your reference jurisdiction in Small Groups
- 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 Google Sheets (during Small Group Discussions)

Individual Assignment 1: Fiscal Provisions Research Assignment

This assignment is designed to ensure all students are familiar with accessing and gleaning information from local budgets and city codes/charters via web research. It is also designed to assess students' ability to present critical fiscal information succinctly.

Assume you are a budget analyst working in Lane County/ Hermiston and your Director has asked you to research how another local government approaches budgeting (covering the seven items listed below) and describe whether the budget document seems comprehensive and accessible to citizens. You will use your reference jurisdiction to complete this assignment.

The product should be an informational memorandum to me and be no more than eight pages (single-spaced) in length (including graphics and tables but excluding appendices). The memorandum should describe the fiscal provisions of the city and state of your reference jurisdiction as described in that government's constitution, code or charter. Some of the required information may also be found in the budget documents of the jurisdiction. In describing their jurisdictions' provisions, students are expected to make comparisons with Hermiston/Lane County. If your reference jurisdiction is in Oregon, you should focus on how your city interprets Oregon statutes differently. If your reference jurisdiction is outside of Oregon, you should focus on how state budgeting requirements differ in Oregon and your state.

At minimum, the paper should explain:

1. How often each budget is promulgated and the approval calendar;
2. The operating budget process;
3. The major sources of funding (revenues) for the operating budget and the proportion of the operating budget each source supports;
4. The major categories of expenditures (or requirements) within the budget;
5. Financial policies;
6. Rules governing bond issuance and the payment of debt service;

Compare and contrast the budgets in your reference jurisdiction and Hermiston or Lane County and offer your assessment of whether the budget document for your reference jurisdiction seems comprehensive and accessible to citizens. What seems to be missing from the document? What could your city learn from your reference jurisdiction?

You may include other information they find interesting and informative as space permits.

ASSIGNMENT DUE BY OCTOBER 24 AT 11:59 PM ON CANVAS

20% OF COURSE GRADE

Individual Assignment 2: Case Study

This assignment is designed to give you an opportunity to evaluate how parks departments and special districts processes work in other jurisdictions. This assignment will generate information for your SCYP project but will be completed individually. Each team member's case studies will be included in the final group paper.

Lane County and Hermiston provided some example jurisdictions to use. You can use these examples or search the web for your own examples. Please work with your teammates to ensure that you're not looking at the same city or district. I encourage you to use your reference jurisdiction.

Suggested Case Studies

Hermiston

- Boardman Parks and Rec Districts
- Hood River Valley Parks and Recreation District, Oregon
- Greater St. Helens Parks and Recreation District, Oregon
- La Pine Parks and Recreation District, Oregon
- Madras Aquatic Center Recreation District, Oregon
- Northern Wasco County Parks and Recreation District, Oregon
- Sisters Parks and Recreation District, Oregon

Lane County

- Bend Parks and Recreation District, Oregon
- Tualatin Hills Parks and Recreation District, Oregon
- King County, Washington
- Portland Metro, Oregon
- Gallatin County, Montana
- Missoula County, Montana
- City of Portland, Oregon
- Lake Oswego, Oregon
- Willamalane Parks and Recreation District, Oregon
- North Clackamas Parks and Recreation District, Oregon

You are asked to report and gather the following information in a 3-5 page memo (single space, text portion]:

- (If applicable) Enabling statutes for Parks and Recreation District in Oregon Revised Statutes
- Briefly describe the community where the parks department or special district is located
- Describe the geographic extent of services, using maps as available.
- Explain the governing structure for the department or district
- (In applicable) describe how the department submits budget requests.
- Describe the revenue sources, rates and total budget for the department or district
 - Make note of the amount and share provided through private sources.
- Describe any bonds or capital projects in the department or district
 - Describe how capital projects were prioritized in bond measures
- Describe the key categories of expenditure for the department or district

ASSIGNMENT DUE NOVEMBER 14 AT 11:59 PM ON CANVAS

10% OF COURSE GRADE

Suggested Reference Jurisdictions

- Boardman
- Hood River, Oregon
- St. Helens, Oregon
- La Pine, Oregon
- Madras, Oregon
- Wasco County, Oregon
- Sisters, Oregon
- Bend, Oregon
- Beaverton, Oregon
- King County, Washington
- Portland, Oregon
- Gallatin County, Montana
- Missoula County, Montana
- Lake Oswego, Oregon
- Springfield, Oregon
- Milwaukie, Oregon

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Group Project – DRAFT DESCRIPTION

In this assignment, you will work on real projects for Lane County and the City of Hermiston under the Sustainable City Year Program (SCYP) and Policy Lab. You will be asked to come up with revenue sources, tax rates, and potential funding packages, then make recommendations to the organization. Based on interests, background and experience (information gathered on Google Docs Survey), students will be assigned to 3-4 person teams to work on two different projects. I will assign groups at the end of Week 1.

The three projects are:

- Lane County Parks: Deferred Maintenance and Local Option Levy
- Hermiston Recreation Center

Detailed descriptions of each project are below. Your final group memo will also include components from assignment 2 in describing case studies of special districts from other jurisdictions. Your team will be asked to produce a 7-10 page memo (not including appendices) to summarize recommendations for staff. You will present your recommendations Week 10.

DRAFT OUTLINE DUE OCTOBER 31 (2.5%)

DRAFT REPORT DUE NOVEMBER 21 (2.5%)

PRESENTATION DUE NOVEMBER 30 OR DECEMBER 2 (10%)

FINAL MEMO DUE DECEMBER 6 at 2:30 PM (20%)

PEER EVALUATIONS DUE DECEMBER 7

35% OF COURSE GRADE

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1. Hermiston Community and Recreation Center

The City of Hermiston is interested in constructing a \$30 million large scale community and recreation center with an indoor aquatics center and other amenities. The city is interested in considering a novel approach to financing such a facility as the political climate does not support a city-level bond measure to finance the facility. The city is considering Intergovernmental Agreements (with Echo, Stanfield, Umatilla and Umatilla County) establishing a quasi- parks and recreation district. The City would then like to compare that approach to forming a parks and recreation as described in Oregon Revised Statutes. The cost recovery goal is 75%. Consultants (Ballard and King) completed a market analysis, funding analysis, and architectural plans in 2018.

The purpose of this project is to evaluate funding options for the district and develop recommendations of methods for increased funding, including reviewing the district current boundary and valuation and researching options for increasing the district tax collections. Students are asked to evaluate financial yield with potential funding options under two geographic scenarios, provide recommendations for geography, tax rate and revenue, and evaluate whether revenue sources are fair, efficient and sustainable. Students are also asked to develop a capital financing strategy for the city.

This project includes elements related to:

- Capital Improvement Programming
- Capital Financing
- Revenue generation
- Property Taxes
- User Fees
- Debt and Bonds

Final Memo Components

- Describe Statutes Related to Parks and Recreation District in Oregon [ORS Chapter 266] - https://www.oregonlegislature.gov/bills_laws/lawsstatutes/2013ors266.html
- Case Studies of Parks and Recreation Districts from other jurisdictions in Oregon (from Assignment 2)
- Offer recommended capital financing strategy with revenue sources and expenditures including:
 - Revenues
 - Evaluate financial yield with potential funding options under two provided geographic scenarios [examples: permanent levy through special district, System Development Charges, user fees]
 - Provide recommendation for geography, tax rate and revenue sources
 - Evaluate whether revenue sources are fair, efficient and sustainable.
 - Governance Strategy
 - Examine advantages and disadvantages of a special district v. intergovernmental agreements
 - Capital Financing Strategy
 - Examine estimated capital and operating costs for new facility
 - Evaluate capital financing strategies for financing new facility based on current and future tax collections (and revenue options.)
 - Case studies of Parks and Rec Special Districts (from Assignment 2)

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2. Lane County Parks

Lane County Parks provides parks and recreation services to the county. The county has 68 parks and open spaces covering 4,400 acres. The division does not receive any General Fund support and operates primarily on user fees, registration fees, and special sales taxes (transient lodging and car rental). The division current has an estimated backlog of \$50 million. The county has enacted a Task Force to examine and recommend funding options. The Task Force recently completed the report and will make recommendations to the Board of County Commissioners.

While the County Commissioners weigh options, county staff are interested in supplemental research to provide information about how other county parks are funded, cost recovery models, and successful bond measures.

Your task is to propose alternative funding options, suggest a cost recovery model under each option, and provide recommendations on ensuring a successful local option levy. Additionally, students will recommend a prioritization approach for identified deferred maintenance needs to include in a \$6 million local option levy over a period of 5 years.

Students are asked to evaluate alternative funding options financial yield with potential funding options and evaluate whether revenue sources are equitable, neutral, efficient and productive.

This project includes elements related to:

- Capital Improvement Programming
- Capital Financing
- Revenue generation
- User Fees
- Debt and Bonds
- Public Private Partnerships
- Special Districts

Final Memo Components

- Case Studies of Parks Departments or Parks and Rec Special Districts (from Assignment 2)
- Potential funding strategies
 - Select at least three packages, which should include a variety of funding options
 - Evaluate potential yield
 - Evaluate funding strategies based on whether revenue sources are equitable, neutral, efficient and productive
- Offer recommended funding sources based on evaluation.