Instructor: Dr. Christina Barsky
Pronouns: She/her/hers
Classroom: LAW 215 or as otherwise noted (e.g., Zoom – identified in the course schedule)
Office: LAW 149 or remote
E-Mail: Christina.Barsky@mso.umt.edu

E-mail is the most reliable way to reach me. In general, I reply to messages within 48 hours (or two business days) of receipt. Please include PUAD 505 in the subject line of your message (this increases my reply efficiency).

Office Telephone: 406-243-2871
You must leave a voice message for me to know that I have missed your call.

Office Hours/Meeting Virtually: Mondays 12:00-1:00pm & Wednesdays 11:00-12:00pm & 4:30-5:30pm (in-person, via telephone, or virtually) or by appointment. Please visit www.calendly.com/doctorbarsky to schedule a meeting.
To meet outside the available hours, please e-mail me. Include a few days/times you are available and what you would like to discuss.
Privilege
I would like to begin our time together by acknowledging that we, at the University of Montana, are in the traditional lands of Indigenous peoples, including the Sélíš, Ksanka, and Qĺispé. Many others, including Blackfeet, Nez Perce, Shoshone, Bannock, and Coeur D’Alene, had and continue to have a crucial presence in the area. We acknowledge the role that the governance and legal system has played in the removal of Indigenous peoples from these lands, and, through our commitment to education, service, and scholarship, strive to improve the quality of justice and equitable policy for future generations. Doing so demands respect for tribal sovereignty and Indigenous cultures as well as accountability to the needs and perspectives of Indigenous peoples, who, from time immemorial to the present and until the end of time, protect and remain connected with this land on which we gather, live, learn, and work.

I situate myself as a guest actively working against colonialism and injustice. I thank the people of Turtle Island, the First People, for the privilege of learning in this space.

Inclusion
All people have the right to be addressed and referred to in accordance with their personal identity. In this class, you will indicate the name you should be called and the pronouns with which you should be addressed. I will do my best to address and refer to all students accordingly and support students in doing so as well. Throughout the semester I will push you to think about inclusivity and how we, as students of public administration, can prepare ourselves to best serve the public.

COVID-Safe Policies
In accordance with federal, county, CDC, and UM guidance, it is required for vaccinated and unvaccinated students, staff, and faculty to wear a facemask during the entirety of class and/or office hours. The Department asks students to stay home if they are sick as doing so will not negatively impact assessment of student performance in this course. If a student, a member of their family, or immediate social group becomes symptomatic, please follow federal, state, local, university, and CDC guidance and work with the DPAP associate dean and course professor to successfully complete your work. If a federal, state, local, university or CDC policy changes during the semester impacts in-person course delivery, this class will shift to fully online or remote (Zoom). A backup plan will be shared by the professor during the first week of the semester to ensure preparedness. The quality of student education will not be impacted: our Department is nationally recognized for its ability to teach across modalities (online, in-person, robot). Vaccinations are free and available to students through Curry Health Center. Please take the time to review our Department’s COVID-Safe FAQ guide.

Learning During a Pandemic
I propose the following principles to foster a successful, supportive learning environment:

1. Your health and safety – physical, mental, and emotional – are the most important. We will prioritize supporting one another
2. Together, we will encourage intellectual nourishment, social connection, support, understanding, and personal accommodation
3. We will remain flexible and adaptable in these dynamic times

Course Description
This course provides an introduction to public budgeting and finance. The budgetary process is, perhaps, the most important and fundamental component of the public policy process and democratic governance. Funding for public programs is inseparable from their operation (and existence). Furthermore, the sources of revenue for public programs can play an important role in the design of government spending. Since the budgetary process is inherently political, we can understand budgets as both political documents and management tools. Simply put, budgets are an expression of societal values. It is necessary, therefore, for public managers to possess the knowledge and skills required to understand the key principles of public budgeting and finance.
Expectations for Student Learning for this Course & the University of Montana’s MPA Program

1. Know, understand, and apply basic principles of public budgeting
2. Analyze the political, economic, and organizational factors on budgetary decision-making
3. Explore how governments pursue policy goals through the budget cycle
4. Critically evaluate the role of power, representation, empathy, judgments, diversity, equity, and inclusion in the public (and nonprofit) sectors, advancing our understanding of cultural awareness through self-reflection, readings, discussions, and assignments
5. Demonstrate professional and graduate-level writing, critical thinking, research, analytical, and public speaking skills

In exploring these learning objectives, this course will introduce and begin to develop core national (NASPAA) MPA competencies to lead and manage in public sector governance.

Required Course Materials
Books and Readings:
  - IR in the course schedule
  - AK in the course schedule
- Moodle required readings (noted with an asterisk in the course schedule, let me know if you experience challenges with the quality of scanned materials)

Additional Materials:
- Weekly (Monday) e-mails (make sure you check your UM e-mail daily)
- Watch weekly lectures
- Watch, listen, and read additional materials as posted (e.g., podcasts, budgeting in the news)

MPA Portfolio
If you are using any assignments from this course for your final MPA portfolio, it is your responsibility to keep track of individual grades and professor feedback. Use your computer’s “snipping tool” or screenshot to capture graded feedback to save with your files. We ask that you very carefully read the MPA Portfolio requirements listed on our website (e.g., you cannot use outlines or case write-ups). We ask that you be mindful of individual and group projects you participate in each semester so you stay on track – we appreciate you doing so. Each DPAP professor will always offer an option to complete projects independently. If you have MPA portfolio questions, please contact the MPA Director.

Course Expectations

Using Moodle
Although this is an in-person course, you are required to visit our Moodle site regularly (at least once per day). Participate in Moodle 101 for students if you are unfamiliar with the platform. Visit http://umonline.umt.edu to access the class.
Weekly E-mails & Lectures
Each week I will post a video lecture covering key themes. To get the most out of our class meetings, watch the lectures before our class meeting on Monday evenings. If video lectures are not already posted, they will be published by 10:00pm Sunday each week.

Attendance and Tardiness
Since we only meet once a week, you are allotted one absence for any reason for the semester.

Laptop/Tablet, Zoom, Robot, Mobile Phone, and other Technology Policy
Your mobile phone should be silenced and not accessed during class (unless you are specifically asked to utilize it for a class activity). Tablets and laptops should not serve as a distraction. If our learning environment becomes diverted as a result of these technologies, I will not allow their use in our classroom. If you are a robot student and technology fails, re-boot without interrupting class. You may not record (audio, video, or still photography) this class except in accordance with ADA accommodations. Any recording made in connection with a disability accommodation are for the student’s personal academic use and may not be distributed in any manner to any other individual, group, entity, or platform. If you have questions or requests, please contact me.

UM E-Mail
I expect you to use your University of Montana student e-mail address for all communications and that you will check this account regularly (i.e., at least once per day). This link provides an overview of UM e-mail.

Professionalism and Communication
E-mail is far and away the best way to reach me, remembering to include “PUAD 505” in the subject line. You are welcome to call my office if you have a time-sensitive need, remembering to leave a message if you do not reach me. I am eager to answer your questions; however, ask that you first consult the syllabus, then look at any announcements, notes, and lectures, and then come to me with your requests. Central to our learning environment is professionalism and respect in communications.

Help with Technology
Call UMOnline by phone, 406-243-4999 or email umonline-help@umontana.edu if technological problems arise. There is no on-call assistance during nights or weekends. I cannot provide IT support, so please contact the appropriate University staff if an issue arises.

Navigation Information
Links for all course sign-ups, the most recent syllabus, general feedback videos, and other material and resources are housed under the “Resources” tab on our class Moodle page.

Course Feedback, Drafts, & Examples
- Please allow for up to ten (10) full business days after the due date to receive assignment feedback
  - I invite you to schedule a meeting with me if you would like additional feedback on an assignment
- I am happy to talk with you about your assignment and/or your assignment outline; however, I will not review draft assignments in this class
- Students should work with the UM Public Speaking and Writing Center to review drafts of written work
- Sample assignments are not provided for graduate-level courses
Guidelines for Written Work
- You are expected to practice professional, graduate-level writing and will be evaluated on content, organization, writing/grammar, and following assignment instructions.
- Work must be typed, double-spaced (unless otherwise noted), utilize 12-point font, and have one-inch margins.
- You are required to utilize proper and appropriate citations. This means parenthetical (in-text) citations and a reference page (APA is preferred. However, since public administration is multi-disciplinary, any academic style is acceptable). Notify me as to what citation style you are using, if not APA.
- Assignments are due on the date/time listed in the course schedule.
- All assignments must be turned in electronically (on Moodle) as a .doc or .docx file (Microsoft Word). If I cannot open the document, you will not receive a grade. E-mail submission of assignments will not be accepted unless specific arrangements have been made.
- Student collusion for individual assignments is not allowed and will be treated as an act of plagiarism. Self-plagiarism (e.g., turning in the same assignment in different classes) will be treated as plagiarism. If you have questions, please contact me.

Assessment (Course Grading)
Rather than assign point scores for assignments throughout the term, your assignments will be assessed using the scale below. I will provide written and/or verbal feedback on assignments within 10 business days. My feedback will include identifying strong elements of your work, drawing your attention to areas for improvement or expansion, questions for consideration, and suggestions to improve your knowledge of course competencies. All assignments for this course must be completed and meet expectations to pass the class.

Approaching learning through an expectations-based assessment process is designed to enhance your experience and foster an open conversation, between you and me, about work product, understanding of content, critical thinking, and assessment. This approach demonstrates our department’s commitment to cultural awareness and attention to the feedback we receive from practitioners in the field (including the use of performance evaluation and centering initiative, curiosity, and critical thinking with the worker/student).

I use the following scale:

**AE = Above Expectations.** Above expected product. You contribute thoughtful and productive ideas, producing very high-quality work. You demonstrate synthesis of and critical engagement with material and pay close attention to detail, going above what is expected. Work demonstrates evaluation and creation. You do everything necessary to Meet Expectations, and: 1) receive feedback and critique in a professional manner; 2) demonstrate a commitment to expanding your knowledge; 3) utilize campus resources (research librarians, Public Speaking and Writing Center) to complete high-quality written work; and, 4) create thoughtful, creative, original assignments showcasing how you “connect the dots” and truly do above what is expected.

**ME = Meets Expectations.** Product produced meets what is expected. You deliver quality work that meets assignment and course criteria. You do what is necessary and adequately engage with the material. You pay attention to detail and adequately complete all elements of an assignment. Work demonstrates application and analysis. To Meet Expectations, you must meet all the stated criteria for assignments (including due dates), actively, consistently, and meaningfully participate in class activities, follow the writing guidelines for all assignments (including careful editing and attention to consistency), complete the mid- and end-of-semester learning assessments, check your UM e-mail and class Moodle site regularly, watch weekly lectures in full (I know if you don’t), practice empiricism by using evidence in all work, and demonstrate your knowledge and understanding of course material and its application in the world around us.
NE = Near Expectations. Product approaches or nearly meets expectations. Your work comes close to meeting the expected/necessary criteria. Engagement with course material is lacking or insufficient. Greater attention to detail would improve the product. Work demonstrates understanding. Work that approaches expectations or is near expectations may suffer from grammatical and formatting issues, lack professional polish, be turned-in late, lack substantial evidence, but demonstrates your thoughtful and honest attempt at meeting expectations (above).

DMN = Does Not Meet Expectations. Product does not meet expectations. Work that does not meet expectations reflects minimal effort and poor-quality contributions. These products do not meet minimally-required standards for the course and assignment and fail to demonstrate engagement with the subject or material. Some actions that will fail to meet expectations include: 1) not following assignment guidelines or expectations; 2) rushed, unprofessional, or presentation of sub-graduate-level writing; 3) requiring reminders to sign-up for projects, check the syllabus for information, and participate in class activities; and, 4) lack of engagement.

Translation of Assessment Feedback to Letter Grades

<table>
<thead>
<tr>
<th>Assessment</th>
<th>Letter Grade</th>
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<tbody>
<tr>
<td>Above Expectations (AE)</td>
<td>A</td>
</tr>
<tr>
<td>Meets/Above Expectations (ME/AE)</td>
<td>B+</td>
</tr>
<tr>
<td>Meets Expectations (ME)</td>
<td>B</td>
</tr>
<tr>
<td>Near Expectations (NE)</td>
<td>B-</td>
</tr>
<tr>
<td>Does Not Meet Expectations (DNM)</td>
<td>C</td>
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</table>

You should keep track of their feedback along the way – if you receive a plurality of ME, you will receive a B for the course. *I encourage you to meet with me at least once during the semester to discuss your progress. Meetings are not required but are encouraged as they provide us an opportunity to talk about what’s working, what could improve, and how I can further your learning experience.*

Earning an A in this course means that you have produced exceptional work and your performance in all aspects of the course has been outstanding.

**Assessment of Subject Mastery (Assignments):**
This semester you will be assessed on 1) participation and 2) Public Budgeting Skills & Synthesis (PBSS)

Please see the appendix for details about the assignments and expectations.

**The Firing Option**
When working in groups, members reserve the right to use the firing option. For members not meeting expectations, the group can seek remedy by first providing a written warning and engaging in consultation with the professor. If performance does not improve, the group can fire the underperforming member. Fired students will then have to conduct an additional research project individually, in addition to completing any remaining course assignments.

**Semester Assignments**

See the course appendix (beginning on page 13) for details.
You must stay up with the course readings and assignments in order to maximize your learning experience. Although this is a general outline of readings, the schedule is subject to change as the semester proceeds. You will be notified of any changes or modifications to the course schedule.

The readings marked with an asterisk (*) are available on Moodle, required, and organized by week.

**SECTION I: BUILDING A THEORY OF PUBLIC BUDGETING**

<table>
<thead>
<tr>
<th>Date &amp; Topic</th>
<th>Questions for Consideration</th>
<th>Readings &amp; Assignments</th>
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<tbody>
<tr>
<td><strong>Week 1: Monday, January 24</strong></td>
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</table>
| Introduction to A Budgetary Idea | What is a budget? In what ways can the word “budget” be defined? Why are there multiple uses of the term “budget”? | Read:  
Cleveland (p. 1-10)*  
Key*  
Drucker* |
| Welcome & Overview | What is the “basic budgeting problem”? | Due:  
Take the Work Style quiz and record your style  
Sign-up for:  
Method/approach (PBSS Assignment 2)  
Socratic Circle  
Partner for PBSS (if you choose) |
| MLK Day: NO CLASS | How are planning and budgeting related? | |
| “It’s clearly a budget. It’s got a lot of numbers in it.” – George W. Bush | How has public budgeting evolved over time? | |
| | Why is public budgeting and finance a core MPA course? | |
| **Week 2: Monday, January 31** | | |
| Public Values and Public Budgeting | What are public values? | Read:  
Jørgensen & Bozeman*  
Tyler & Willard*  
IR, Introduction  
NASBO, p. 3-15 & (skim) 16-38* |
| “I have not failed. I’ve just found 10,000 ways that won’t work.” – Thomas Edison | Which values matter for budgeting? | Due:  
Post your media to Jamboard by 1/31 at 4:30pm  
Finalize PBSS partner (if you choose) |
| | How do policymakers navigate between personal values and societal values? | |
| | How do public values and public budgeting relate to the pillars of PA? | |
| **Week 3: Monday, February 7** | | |
| The Politics of Public Budgeting | Why is public budgeting necessarily political? | Read:  
IR, Chpt. 1, Chpt. 3  
Lindblom*  
Ebdon & Franklin*  
Allcott, Lockwood, & Taubinsky* |
<p>| Budgeting as Policymaking | How is budgeting policymaking? | |</p>
<table>
<thead>
<tr>
<th>Class via Zoom</th>
<th>How can well-intended budget-makers avoid unintended consequences in their decision-making?</th>
<th>Listen:</th>
<th>• <em>The Indicator</em> “I can’t believe it’s not a budget”</th>
</tr>
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<tbody>
<tr>
<td>“The difference between them and us is that we want to check government spending and they want to spend government checks.” – Ronald Reagan</td>
<td>What is the role of tradeoffs in public budgeting?</td>
<td>Play:</td>
<td>• <em>The Fiscal Ship</em></td>
</tr>
<tr>
<td><strong>Week 4: Monday, February 14</strong></td>
<td><strong>Week 4: Monday, February 14</strong></td>
<td>Due:</td>
<td>• Work on PBSS Assignment 1</td>
</tr>
<tr>
<td>The System</td>
<td>The System</td>
<td><strong>Read:</strong></td>
<td>• What Would Hayek Do? And Keynes?*</td>
</tr>
<tr>
<td>Introduction to Economic Theory &amp; Ideology</td>
<td>Introduction to Economic Theory &amp; Ideology</td>
<td>• Lowrey*</td>
<td>• <em>The Role of Government...Transcript</em></td>
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<tr>
<td>“Economy is idealism in its most practical form.” – Calvin Coolidge</td>
<td>“Economy is idealism in its most practical form.” – Calvin Coolidge</td>
<td><strong>Watch:</strong></td>
<td>• <em>Economic Schools of Thought</em></td>
</tr>
<tr>
<td><strong>Week 5: Monday, February 21</strong></td>
<td><strong>Week 5: Monday, February 21</strong></td>
<td>• <em>The Role of Government in a Free Society</em> (first 15 minutes)*</td>
<td>Due:</td>
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<tr>
<td>Budget Concepts</td>
<td>Budget Concepts</td>
<td><strong>Due:</strong></td>
<td>• PBSS Assignment 1 due 2/14 by 4:30pm</td>
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<tr>
<td>Budgeting for Equity</td>
<td>Budgeting for Equity</td>
<td><strong>Read:</strong></td>
<td>• IR, Chpt. 4</td>
</tr>
<tr>
<td>Budgeting as Policymaking, revisited</td>
<td>Budgeting as Policymaking, revisited</td>
<td>• Lewis*</td>
<td>• Grizzle*</td>
</tr>
<tr>
<td>Presidents’ Day: NO CLASS</td>
<td>Presidents’ Day: NO CLASS</td>
<td>• <em>Walcott, Fabian</em></td>
<td>• Rubin &amp; Bartle*</td>
</tr>
<tr>
<td>“It takes as much energy to wish as it does to plan.” – Eleanor Roosevelt</td>
<td>“It takes as much energy to wish as it does to plan.” – Eleanor Roosevelt</td>
<td>• Rubin &amp; Bartle*</td>
<td>• Two Rubin &amp; Bartle articles</td>
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<tr>
<td><strong>Week 6: Monday, February 28</strong></td>
<td><strong>Week 6: Monday, February 28</strong></td>
<td><strong>Read (all):</strong></td>
<td>• OECD Green Budgeting Framework, OECD Green Budgeting and Tax Policy Tools (skim)</td>
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<tr>
<td>Budget Methods &amp; Approaches</td>
<td>Budget Methods &amp; Approaches</td>
<td>• Schick*</td>
<td><strong>Listen:</strong></td>
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<tr>
<td>How do various budget approaches relate to one another?</td>
<td>How do various budget approaches relate to one another?</td>
<td>• Rubin*</td>
<td>• <strong>Consider This</strong> “Budget 2022: Gender Responsive”</td>
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<td><strong>Due:</strong></td>
<td><strong>Due:</strong></td>
<td>• Ghilarducci*</td>
<td><strong>Due:</strong></td>
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<tr>
<td>• Work on PBSS Assignment 2</td>
<td>• Work on PBSS Assignment 2</td>
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</table>
"I do not believe that things happen accidentally; I believe you earn them."
– Madeleine Albright

Which process(es) do you think are the most effective? The least? What are the practical implications of each?

How can budget methods/approaches be combined for success?

Is any theoretical approach ever perfectly implemented in practice?

- Mitchell et al.*
- Topic readings you signed-up for on this Google Doc

Watch:
- DPAP Cultural Awareness Video

Due:
- Complete mid-semester learning evaluations (sent from Moodle) by 3/4 at 5:00pm
- Work on PBSS Assignment 2

SECTION II: THE NUTS AND BOLTS OF PUBLIC BUDGETING

<table>
<thead>
<tr>
<th>Date &amp; Topic</th>
<th>Questions for Consideration</th>
<th>Readings &amp; Assignments</th>
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<tbody>
<tr>
<td><strong>Week 7: Monday, March 7</strong></td>
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<tr>
<td>Revenue</td>
<td>How does the government raise revenue?</td>
<td>Read:</td>
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<td>What tax or taxes constitute the main sources of revenue for the U.S. national government?</td>
<td>• IR, Chpt. 2</td>
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<td>What does it mean for a tax system to be progressive? What about regressive? What difference does it make?</td>
<td>• Morrison*</td>
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<td>Read:</td>
<td>• Kavanagh &amp; Ingelhart*</td>
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<td></td>
<td>• Morrison*</td>
<td>• Review Section 1, 2, and 3 of the FY 2022-23 MT Governor’s revenue estimates</td>
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<td>Listen:</td>
<td>• Planet Money “Budget Time”</td>
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<td></td>
<td>Due:</td>
<td>• PBSS Assignment 2 due 3/7 by 4:30pm</td>
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<tr>
<td><strong>Week 8: Monday, March 14</strong></td>
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<tr>
<td>Expenditure</td>
<td>What are outlays?</td>
<td>Read:</td>
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<td></td>
<td>How do public entities spend their budgets?</td>
<td>• IR, Chpt. 5</td>
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<td>What are the largest expenditures in the U.S. and Montana budget?</td>
<td>• Wildavsky &amp; Caiden, Chpt. 7*</td>
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<td>Were you surprised by the costs of certain government programs or policies? Which? What surprised you?</td>
<td>• Review one (Section A through F) of Volume 1 of the MT Governor’s budget</td>
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<td></td>
<td>What does “spending through the tax code” mean?</td>
<td>Watch:</td>
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<td></td>
<td>• The Pension Gamble*</td>
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<td>Due:</td>
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<td></td>
<td></td>
<td>• Work on PBSS Assignment 3</td>
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</table>
### Week 9: Monday, March 21

**SPRING BREAK: NO CLASS**

Recharge and Relax!

### Week 10: Monday, March 28

**The Change Jar: Balanced Budgets, Tax Expenditures, Unfunded Mandates, and Trust Funds**

The Bureaucracy of Budgets

Controlling for Waste, Fraud, and Abuse

*“The budget should be balanced not by more taxes, but by reduction of follies.”*  
– Herbert Hoover

**Read:**
- IR, Chpts. 6 -9
- Joyce*
- Gullo*
- Congressional Research Service (all pages, skim p. 11-20)*

**Due:**
- Work on PBSS 3

### Week 11: Monday, April 4

**Municipalities and Fiscal Health**

*Class via Zoom*

*“There’s a lot more to life than just struggling to make money.”*  
– Ann Richards

**Read:**
- Brown (skim)*
- Maher & Nollenberger (skim)*
- Leiser & Mills*
- McDonald*
- McDonald, Decker, & Johnson*
- Mitchell et al.*
- ICMA

**Due:**
- PBSS Assignment 3 due 4/4 by 4:30pm

### SECTION III: TRANSFORMING THE BLACK BOX OF PUBLIC BUDGETING

<table>
<thead>
<tr>
<th>Date &amp; Topic</th>
<th>Questions for Consideration</th>
<th>Readings &amp; Assignments</th>
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</thead>
</table>
| **Week 12: Monday, April 11**  
Transformation in an American City | *How is outcome-based budgeting connected to other budget processes/approaches?*  
*What does Andrew Kleine’s story suggest about organizational leadership?*  
*Who is missing from the Baltimore budget table?* | **Read:**
- AK, Forward through Chpt. 3 (p. vii - 79)
**Listen:**
- Government Innovator with Andrew Kleine
**Due:**
- Work on PBSS Assignment 4  
- Socratic Circle leaders’ discussion leaders/questions |
### Week 13: Monday, April 18

**Alternative Approaches**

“How pennies don’t fall from heaven; they have to be earned here on earth.”
– Margaret Thatcher

**Tax Day!**

How do you think about equity concerns and the budgeting approach undertaken in Baltimore?

If you were to implement outcome-based budgeting in an organization, how would you build stakeholder buy-in?

Is outcome-based budgeting practical?

Read:
- AK, Chpts. 4-7 (p. 79 - 173)

Due:
- Work on PBSS Assignment 4
- Socratic Circle leaders’ discussion leaders/questions

### Week 14: Monday, April 25

**The Future of Public Budgeting**

“We do not have a money problem in America. We have a values and priorities problem.”
– Marian Wright Edelman

Do you think outcome-budgeting could work in larger (e.g., states) or smaller (e.g., villages and towns) jurisdictions? Why or why not?

What can we do to build effective and equitable budgets in the future?

Do we have a money problem in America? Or a values and priorities problem? Or something else?

Read:
- AK, Chpts. 8 - 11 (p. 173 - 239)

Due:
- Work on PBSS Assignment 4
- Socratic Circle leaders’ discussion leaders/questions

### Week 15: Monday, May 2

**From Black Box Budgeting to Participatory Transparency**

“The budget is absolutely interlinked – to our ability to fund our education system, to clean up drinking water, is linked with our ability to rebuild roads in this state. I am not signing anything unless it’s all done together.”
– Gretchen Whitmer

How can public administrators make the “black box of public budgeting” transparent?

What tools would you employ to increase participation in the public budgeting process?

How are budgeting and public policymaking connected?

What remains unanswered in our study of public budgeting?

Watch:
- The Gateway Drug to Democracy

Due:
- Post your retrospective media on Jamboard by 5/2 at 4:30pm

### Week 16: Monday, May 9

**No Class**

Final Work Due

How will you take what you learned in this class into the future?

How do you think about the politics and administration of public budgeting today?

Due:
- PBSS Assignment 4 due 5/9 by 4:30pm
- If you worked with a partner: turn in self- and peer-assessment by 5/9 at 4:30pm
- Complete end-of-semester learning evaluation (sent from Moodle)
Classroom Policies

**Extra Credit:** I do not offer extra credit for this course.

**Make-up Exams:** There is no exam in this course.

**Classroom Etiquette:** Our classroom will be a civil and supportive space. Should anyone fail to act in an appropriate manner, I reserve the right to remove them from the course and course discussions. Recording of any kind is not allowed unless you receive written and/or verbal permission from me.

**E-Mail Etiquette:** E-mail is an effective tool and a good way for you to reach out to me with questions, but it does not replace speaking “face-to-face.” If you have involved questions about course material, your performance, or simply want to check-in, please set up a time to meet with me via Zoom. Please include **PUAD 505** in the subject line of your e-mails and keep professionalism in mind.

**Incompletes or Withdrawals (“W”) from the Course:** Please see the University’s add/drop policies.

**Late Assignments:** I expect you to turn in assignments on time. With this being said, I understand that the lives of the individuals in our DPAP community are dynamic and require flexibility. It is my preference that you reach out to me sooner, rather than later (e.g., 72 hours before an assignment is due) about adjustments to the course schedule. I respect you – it is OK if you need extra time to complete work. Part of respect is believing you and your autonomy – I do not need you to prove, explain, or answer why – I simply ask that you let me know of your need for extra time, so that I can plan accordingly. All assignments must be completed to receive a grade for the course.

**University Attendance Policy:** Please review the course participation and attendance policy (above). Students who are registered for this course but do attend the first two class meetings may be required by the professor to drop the course. This rule allows for early identification of class vacancies to permit students on the course waitlist to add classes. Students not allowed to remain in the course must complete a drop form or drop the course via CyberBear to avoid receiving a failing grade. Students who know they will be absent should contact the professor in advance.

**Wikipedia:** The “Truth by Consensus” is not reliable (and sometimes not valid). Wikipedia should not be cited in any assignment. Rather, you should become comfortable citing scholarly research and peer-reviewed sources as a graduate student at the University of Montana. Visit the Mansfield Library website and Google Scholar for resources. Reach out to me for further help, if necessary.

**Academic Dishonesty (Plagiarism):** Students must follow the University’s policies for academic dishonesty. More information can be found in the **Student Code of Conduct**. All work submitted for this course must be your own. Duplicated work (e.g., work completed for another class) will be considered an act of self-plagiarism. Acts of academic dishonesty will result in a grade of zero (0) for the assignment. Moreover, acts of plagiarism will be reported to the Academic Court. To avoid plagiarizing, cite each reference or source (direct quotes, paraphrases, **and** ideas and charts/graphs) you use and give proper credit for the ideas, opinions, and findings of others. When using the direct quotes, use quotation marks and appropriate citation (e.g., APA) that include the page number and work’s title. If you’re not sure if it’s plagiarism, err on the side of citation.

**Moodle:** This course is supported by Moodle. Please refer to the site regularly for additional readings, supplemental material, announcements, grades, assignment submissions, or updates to the schedule. When submitting assignments on Moodle, students should attach Microsoft Word .doc or .docx files.

**Sensitive Course Materials:** Advanced degree programs seek to expand and challenge student assumptions, worldviews, and conceptions. Therefore, we engage with a wide range of material that do not necessarily affirm personal or broadly accepted understandings, ideas, and beliefs. Students are encouraged to discuss these matters with the professor.

**Disability Assistance:** The University of Montana assures equal access to instruction through collaboration between students with disabilities and instructors. For more information, visit **Disability Services for Students**. If you think you may have a disability adversely affecting your academic performance, and you have not already registered with Disability Services, please contact DSS in Lommasson Center 154 or call 406/243.2243. As your professor, I will work with DSS to provide an appropriate modification.

**Cultural Leave Policy:** The University of Montana Cultural and Ceremonial Leave Policy states: Cultural or ceremonial leave allows excused absences for cultural, religious, and ceremonial purposes to meet the student’s customs and traditions or to participate in related activities. To receive an authorized absence for a cultural, religious or ceremonial event the student or their advisor (proxy) must submit a formal written request to the instructor. This must include a brief description (with inclusive dates) of the cultural event or ceremony and the importance of the student’s attendance or participation. Authorization for the absence is subject to approval by the instructor. Appeals may be made to the Chair, Dean or Provost. The excused absence or leave may not exceed five academic calendar days (not including weekends or holidays). Students remain responsible for completion or make-up of assignments as defined in the syllabus, at the discretion of the instructor.

**Food and Housing Assistance:** Any student who faces challenges securing food or housing, and believes that this could affect their performance in this course, is urged to contact any or all of the following campuses resources: **UM Food Pantry** (or via @pantryUm on Twitter, @UMPantry on Facebook, um _pantry on Instagram). The ASUM Renter Center has compiled a list of resources for UM students experiencing or at risk of housing instability and food insecurity.
Appendix

Participation & Reflection
We will engage in collaborative discussions, personal reflections, and other practice activities in this course. My discussion expectations and details about discussions are provided below:

### Discussion Expectations
My expectations for discussion can be summarized as including:
- **Quality over quantity**: I expect us to engage in a thoughtful and challenging dialogue.
- **Remain on topic**
- **Utilize evidence (i.e., empiricism)**: Cite course materials, outside reliable sources.
- **Professionalism and respect**
- **Inclusion, an open mind, and challenging ourselves**

### Weeks 12-14: Socratic Circle Discussion Leaders & Questions (due via Moodle by 4:30pm on the day [Monday] you signed-up to lead)

**City on the Line: Socratic circles**

You will sign-up for a Socratic Circle date/time during the first week of class. During our Socratic Circles, we will participate in a student-led discussion of the Andrew Kleine text, *City on the Line*. To prepare, read the assigned AK pages for the week as well as the Socratic Circle information (in Moodle), then:

- Compose two thoughtful discussion questions that engage the pages assigned within Andrew Kleine text for your week.
- Include a brief (no more than 1-page) discussion about your thinking/learning from the pages assigned (i.e., synthesis).
- Submit your write-up on Moodle by 4:30pm on Monday of the week you signed-up to lead.
- Arrive to the Socratic Circle on-time and with your questions and reading notes to our discussion.
- Actively lead the discussion, engaging your peers in a course material-based conversation.
- I recommend contacting your fellow discussion leaders to plan for leading the class meeting.

### Public Budgeting Skills & Synthesis (PBSS)
Throughout the term, you will complete a series of assignments that demonstrate your knowledge, understanding, and comfort with public budgeting and finance. In the end, you will compile these assignments into a final collection that can be used for your MPA graduation portfolio.

You are welcome to work with a partner to complete PBSS Assignments (working with the same individual on each assignment). Regardless of whether you work in a team this term, each of you will complete a budget memo (Assignment 2) and will complete Assignment 4 (reflection and putting it all together) individually.

**Assignment 1: Floating the Fiscal Ship (Due Feb. 14 at 4:30pm Mountain)**
For this assignment, you will play a budget simulation called the “Fiscal Ship” (link in Moodle) and write a short paper about your experience. To complete this assignment:

<table>
<thead>
<tr>
<th>First</th>
<th>Choose three broad governing goals from those provided</th>
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<tr>
<td>Then</td>
<td>Play the Fiscal Ship (the simulation will take at least an hour, plan accordingly)</td>
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In 4-5 double-spaced pages (not including reference list):
- Identify the governing goals you selected and explain why you choose them. Consider who the goals benefit and who they disadvantage (e.g., unintended consequences)
- Explore how your policy choices work in concert (or don’t) to achieve your goals. What choices did you make and why? Are your choices realistic in today’s political environment? Were any of your governing goals at odds with one another? What about societal or your personal values?
- Consider how the political context of public budgeting informed your choices. What factors influenced your decision-making? Explain if you were able to set America on a sustainable path and what your policy choices mean for the future

Include
Reference at least three course readings in your paper (appropriately cited). Any claims you make in the paper should be empirical with appropriate references.

Assignment 2: Budget Methods Memo (Due March 7 at 4:30pm Mountain)
For this assignment, you will sign-up (during Week 1) for readings related to a budget method/approach. The sign-up process will ensure distribution of the class among the approaches, as you will share your synthesis memos with one another. **If you are working with a teammate**, please sign-up individually, for different budgetary approaches (you will write **two memos**, each on a different approach, and are welcome to work together to do so). To complete this assignment:

<table>
<thead>
<tr>
<th>First</th>
<th>Read your assigned reading(s)</th>
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<tr>
<td>Then</td>
<td>Review the memo-writing guides <a href="#">here</a> and <a href="#">here</a></td>
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<td>Construct a polished, 1-2 page <strong>single-spaced</strong> memo (not counting references) that:</td>
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<tr>
<td>- Synthesizes the budget method/approach</td>
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<td>- Explains the central claim(s) or thesis (i.e., identification of why someone would use this approach and what the approach claims to do)</td>
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<tr>
<td>- Identifies and explains/defines key terms</td>
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<tr>
<td>- Provides commentary on how the approach is used. What are its strengths? What are its weaknesses?</td>
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<tr>
<td>- Offers an example of how the method is used in practice. <strong>This example should not come from your primary source reading(s), but from outside investigation</strong></td>
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<tr>
<th>Include</th>
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<tbody>
<tr>
<td>Appropriate citation and references, memo formatting</td>
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</table>

Assignment 3: Building a Public Budget (Due April 4 at 4:30pm Mountain)
To get comfortable with the budget process, in this assignment you will play the role of a deputy county budget director and prepare a budget for a newly consolidated library system. To complete this assignment:

<table>
<thead>
<tr>
<th>First</th>
<th>Review and download all of the exercise forms (on the “Resources” tab)</th>
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<tr>
<td>Then</td>
<td>Develop a complete FY 1 budget request for the County Library (build your own Form 80)</td>
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<tr>
<td>Compose a 5-7 page, double-spaced paper (not including the Appendix) that:</td>
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<td>- Includes the values or priorities that guided your budget decision-making process</td>
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• Explains why you made the budget choices that you did
• Identifies if you achieved the mandated three percent savings. If so, how did you accomplish this? If not, why?
• Explores the strengths and weaknesses of the line-item budget format
• Addresses if there is any information you would have liked to have that was not provided and why this information is important (consider how ambiguity connects with public budgeting “in real life”)
• Articulates the questions you think members of the Board of Supervisors and public should consider when reviewing your proposed budget

Attach your complete budget as a table identifying categories (lines) and allocations as an Appendix to your paper.

Include
At least three references to course materials (appropriately cited) in your paper. Don’t forget to include references to your Appendix (i.e., proposed budget) in-text.

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Assignment 4: Synthesis Reflection (Due May 9 at 4:30pm Mountain)

In your final assignment, you will reflect and synthesize what you have learned this term. You will produce a polished compendium of all PBSS assignments in this class that includes Assignments 1-4, a cover page, and a table of contents. Your compendium is appropriate to use (if applicable) in your MPA graduation portfolio. This assignment (Assignment 4) will appear at the beginning of your compendium, followed by Assignments 1, 2, and 3. **If you are working with a teammate, you should complete this assignment individually.** To complete this assignment:

<table>
<thead>
<tr>
<th>First</th>
<th>Complete any revisions to your Assignment 1, 2, and 3</th>
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<tbody>
<tr>
<td>Then</td>
<td>Reflect on your learning and skill development and practice in this class</td>
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<td>Next</td>
<td>Write 4-5 double-spaced pages (not including references) that:</td>
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<td>• Reflects on the theories and skills you learned in this class</td>
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<td>• Considers how, even if you do not become a budget director, you can apply the lessons from public budgeting in your own thinking, learning, and/or practice</td>
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<td>• Explores how the politics of public budgeting affects public administration and policy</td>
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<td>• Addresses how the public itself should be considered in developing and funding public priorities</td>
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<td>• Discusses the connection between equity, values, and budgets</td>
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<td></td>
<td>• Engages concerns for representation and equity in the practice of public (and nonprofit) budgeting</td>
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<td></td>
<td>• Recommendations you have for the future of public budgeting and what steps should be taken</td>
</tr>
<tr>
<td>Include</td>
<td>At least five references to course materials (appropriately cited), page numbers that accurately correspond to the table of contents</td>
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