

University of Montana  
Baucus Institute Department of Public Administration & Policy  
Alexander Blewett III School of Law  
PUAD 505 (Section 50): Public Budgeting & Finance  
Fall 2021: August 30 – December 17  
Online  
Three (3) Credit Hours



**Instructor:** Dr. Christina Barsky

**Pronouns:** She/her/hers

**Classroom:** Online

**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:** Wednesdays 1:00-2:00pm & 4:30-5:30pm and Thursdays 12:00-1:00pm (in-person, via telephone, or virtually) or by appointment.

*Please visit [www.calendly.com/doctorbarsky](http://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 Séliš, Ksanka, and Qíispé. 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

Although this course does have assignment deadlines that should be followed, the Department asks that if you are sick or become sick, please work with your professor to develop a plan for successful completion in this course. Our Department will follow federal, state, local, university and CDC guidelines for COVID-19. 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 me to complete required coursework. 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, prejudgments, 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:

- Rubin, Irene. (2020). *The politics of public budgeting: Getting and spending, borrowing and balancing*. (9<sup>th</sup> ed.). Thousand Oaks, CA: Sage.
  - **IR** in the course schedule
- Kleine, Andrew. (2018). *City on the line: How Baltimore transformed its budget to beat the Great Recession and deliver outcomes*. Lanham: Rowman and Littlefield.
  - **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

Since this is an online course, you are required to visit our Moodle site 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

Every Monday (or, if Monday is a University holiday, the following day) I will send an e-mail to your University of Montana e-mail account providing important updates for the week. Be sure to read each e-mail as soon as you receive it. As well, each week I will post a brief video lecture that provides an overview of the

materials for the week and/or highlights of a specific skill, idea, or practice. These videos are organized by week and are embedded in our Moodle Site. Videos **are not** a replacement for the weekly readings. *If video lectures are not already posted, they will be published by 10:00pm Monday (or Tuesday, if Monday is a holiday) each week.*

### UM E-Mail

I expect you to use your umontana 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 my weekly e-mails 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 UOnline by phone, 406-243-4999 or email [umonline-help@umontana.edu](mailto: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 of 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. Part of this process includes a mid-semester assessment, optional 1:1 mid-semester conference, and an end-of-term self-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.

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 (there are weeks set aside around the mid-term mark to help facilitate this process). 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.

## Course Schedule

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		
Date	Topic	Readings & Assignments
<b>Week 1</b> Aug. 30 – Sept. 5	<b>Introduction Welcome &amp; Overview</b>  <i>“It’s clearly a budget. It’s got a lot of numbers in it.”</i> – George W. Bush	<b>Read:</b> <ul style="list-style-type: none"> <li>Cleveland (p. 1-10)*</li> <li>Key*</li> <li>Drucker*</li> </ul>
		<b>Due:</b> <ul style="list-style-type: none"> <li>Introduction discussion               <ul style="list-style-type: none"> <li>Discussion closes 9/4 at 10:00pm</li> </ul> </li> <li>Take the Work Style quiz and record your style</li> </ul>

		<ul style="list-style-type: none"> <li>Sign-up for: <ul style="list-style-type: none"> <li><a href="#">Method/approach (PBSS Assignment 2)</a></li> <li><a href="#">Socratic Circle</a></li> <li><a href="#">Partner for PBSS (if you choose)</a></li> </ul> </li> <li>Mark your calendar for trivia on 11/2 at 5:30pm <ul style="list-style-type: none"> <li>If you have a conflict, let me know ASAP</li> </ul> </li> </ul>
<b><u>Week 2</u></b> Sept. 6 – Sept. 12  <i>Labor Day Sept. 6</i> <i>(University Holiday)</i>	<p style="text-align: center;"><b>A Budgetary Idea</b></p> <p style="text-align: center;"><i>“I have not failed. I’ve just found 10,000 ways that won’t work.”</i>  – Thomas Edison</p>	<p><b><u>Read:</u></b></p> <ul style="list-style-type: none"> <li>Jørgensen &amp; Bozeman*</li> <li>Tyler &amp; Willard*</li> <li>IR, Introduction</li> <li>NASBO, p. 3-15 &amp; (skim) 16-38*</li> </ul> <p><b><u>Due:</u></b></p> <ul style="list-style-type: none"> <li><a href="#">Finalize PBSS partner</a> (if you choose)</li> <li>Priorities discussion <ul style="list-style-type: none"> <li>Initial post by 9/8 at 10:00pm</li> <li>Discussion closes 9/11 at 10:00pm</li> </ul> </li> </ul>
<b><u>Week 3</u></b> Sept. 13 – Sept. 19	<p style="text-align: center;"><b>The Politics of Public Budgeting</b>  <b>Budgeting as Policymaking</b></p> <p style="text-align: center;"><i>“The difference between them and us is that we want to check government spending and they want to spend government checks.”</i>  – Ronald Reagan</p>	<p><b><u>Read:</u></b></p> <ul style="list-style-type: none"> <li>IR, Chpt. 1, Chpt. 3</li> <li>Lindblom*</li> <li>Ebdon &amp; Franklin*</li> <li>Allcott, Lockwood, &amp; Taubinsky*</li> </ul> <p><b><u>Play:</u></b></p> <ul style="list-style-type: none"> <li><a href="#">The Fiscal Ship</a></li> </ul> <p><b><u>Due:</u></b></p> <ul style="list-style-type: none"> <li>Work on PBSS Assignment 1</li> </ul>
<b><u>Week 4</u></b> Sept. 20 – Sept. 26	<p style="text-align: center;"><b>The System</b>  <b>Introduction to Economic Theory &amp; Ideology</b></p> <p style="text-align: center;"><i>“Economy is idealism in its most practical form.”</i>  – Calvin Coolidge</p>	<p><b><u>Read:</u></b></p> <ul style="list-style-type: none"> <li>What Would Hayek Do? And Keynes?*</li> <li>Lowrey*</li> <li><i>The Role of Government...</i> Transcript*</li> </ul> <p><b><u>Watch:</u></b></p> <ul style="list-style-type: none"> <li><i>Economic Schools of Thought</i>*</li> <li><i>Fight of the Century</i>*</li> <li><i>The Role of Government in a Free Society</i> (first 15 minutes)*</li> </ul> <p><b><u>Due:</u></b></p> <ul style="list-style-type: none"> <li>PBSS Assignment 1 due 9/25 by 10:00pm</li> </ul>
<b><u>Week 5</u></b> Sept. 27 – Oct. 3	<p style="text-align: center;"><b>Budgeting as Policymaking</b>  <b>Budget Concepts</b>  <b>Budgeting for Equity</b></p>	<p><b><u>Read:</u></b></p> <ul style="list-style-type: none"> <li>IR, Chpt. 4</li> <li>Lewis*</li> </ul>

	<p><i>"It takes as much energy to wish as it does to plan."</i> – Eleanor Roosevelt</p>	<ul style="list-style-type: none"> <li>• Grizzle*</li> <li>• <a href="#">Walcott, Fabian</a></li> <li>• Rubin &amp; Bartle*</li> <li>• <a href="#">OECD Green Budgeting Framework</a>, <a href="#">OECD Green Budgeting and Tax Policy Tools</a> (skim)</li> </ul>
		<p><b>Due:</b></p> <ul style="list-style-type: none"> <li>• Values, Tradeoffs, and Choices discussion <ul style="list-style-type: none"> <li>• Initial post by 9/29 at 10:00pm</li> <li>• Discussion closes 10/2 at 10:00pm Mountain)</li> </ul> </li> <li>• Work on PBSS Assignment 2</li> </ul>
<p><b>Week 6</b> Oct. 4 – Oct. 10</p>	<p><b>Budget Methods &amp; Approaches</b></p> <p><i>"I do not believe that things happen accidentally; I believe you earn them."</i> – Madeleine Albright</p>	<p><b>Read (all):</b></p> <ul style="list-style-type: none"> <li>• Schick*</li> <li>• Rubin*</li> <li>• Ghilarducci*</li> <li>• <b>Topic readings you signed-up for on <a href="#">this Google Doc</a></b></li> </ul>
		<p><b>Watch:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">DPAP Cultural Awareness Video</a></li> </ul>
		<p><b>Due:</b></p> <ul style="list-style-type: none"> <li>• Complete mid-semester learning evaluations (sent from Moodle) by 10/9 at 10:00pm</li> <li>• Work on PBSS Assignment 2</li> </ul>
<p><b>SECTION II: THE NUTS AND BOLTS OF PUBLIC BUDGETING</b></p>		
Date	Topic	Readings & Assignments
<p><b>Week 7</b> Oct. 11 – Oct. 17 <i>Indigenous Peoples Day</i> Oct. 11</p>	<p><b>Revenue</b></p> <p><i>"We must consult our means rather than our wishes."</i> – George Washington</p>	<p><b>Read:</b></p> <ul style="list-style-type: none"> <li>• IR, Chpt. 2</li> <li>• Morrison*</li> <li>• Kavanagh &amp; Ingelhart*</li> <li>• Review <a href="#">Section 1, 2, and 3 of the FY 2022-23 MT Governor's revenue estimates</a> <ul style="list-style-type: none"> <li>• Outside of Montana? Review your state governor's revenue estimates</li> </ul> </li> </ul>
		<p><b>Due:</b></p> <ul style="list-style-type: none"> <li>• PBSS Assignment 2 due 10/16 by 10:00pm</li> </ul>
<p><b>Week 8</b> Oct. 18 – Oct. 24</p>	<p><b>Expenditure</b></p>	<p><b>Read:</b></p> <ul style="list-style-type: none"> <li>• IR, Chpt. 5</li> <li>• Wildavsky &amp; Caiden, Chpt. 7*</li> </ul>



	<p><i>“Every gun that is made, every warship launched, every rocket fired signifies in the final sense, a theft from those who hunger and are not fed, those who are cold and not clothed. This world in arms is not spending money alone. It is spending the sweat of its laborers, the genius of its scientists, the hopes of its children. This is not a way of life at all in any true sense.”</i></p> <p>– Dwight D. Eisenhower</p>	<ul style="list-style-type: none"> <li>Review <u>one</u> (<a href="#">Section A through F</a>) of <a href="#">Volume 1 of the MT Governor’s budget</a> <ul style="list-style-type: none"> <li>Not in Montana? Review your state governor’s budget</li> </ul> </li> </ul> <p><b>Watch:</b></p> <ul style="list-style-type: none"> <li><i>The Pension Gamble*</i></li> </ul> <p><b>Due:</b></p> <ul style="list-style-type: none"> <li>Methods/approaches discussion (closes 10/23 at 10:00pm)</li> <li><a href="#">Sign-up for trivia teams</a> by 10/23 at 10:00pm <ul style="list-style-type: none"> <li>Deadline to let me know if you have a conflict</li> </ul> </li> <li>Work on PBSS Assignment 3</li> </ul>
<p><b>Week 9</b> Oct. 25 – Oct. 31</p>	<p><b>Change Jar</b> <b>Balanced Budgets, Tax Expenditures, Unfunded Mandates, and Trust Funds</b></p> <p><i>“The budget should be balanced not by more taxes, but by reduction of follies.”</i></p> <p>– Herbert Hoover</p>	<p><b>Read:</b></p> <ul style="list-style-type: none"> <li>IR, Chpt. 6 &amp; Chpt. 7</li> <li>Joyce*</li> <li>Gullo*</li> <li>Congressional Research Service (all pages, skim p. 11-20)*</li> </ul> <p><b>Due:</b></p> <ul style="list-style-type: none"> <li>Work on PBSS Assignment 3</li> </ul>
<p><b>Week 10</b> Nov. 1 – Nov. 7 <i>Election Day Nov. 2 VOTE</i></p>	<p><b>The Bureaucracy of Budgets</b> <b>Controlling for Waste, Fraud, and Abuse</b></p> <p><i>“Pennies don’t fall from heaven; they have to be earned here on earth.”</i></p> <p>– Margaret Thatcher</p>	<p><b>Read:</b></p> <ul style="list-style-type: none"> <li>IR, Chpt. 8 &amp; Chpt. 9</li> </ul> <p><b>Due:</b></p> <ul style="list-style-type: none"> <li>Trivia! 11/2 at 5:30pm via Zoom (link in Moodle)</li> </ul>
<p><b>Week 11</b> Nov. 8 – Nov. 14  <i>Veterans Day Nov. 11 (University Holiday)</i></p>	<p><b>Municipalities and Fiscal Health</b></p> <p><i>“There’s a lot more to life than just struggling to make money.”</i></p> <p>– Ann Richards</p>	<p><b>Read:</b></p> <ul style="list-style-type: none"> <li>Brown*</li> <li>Maher &amp; Nollenberger*</li> <li>McDonald*</li> <li>McDonald, Decker, &amp; Johnson*</li> <li>Leiser &amp; Mills</li> <li>ICMA/Aylward*</li> </ul> <p><b>Due:</b></p> <ul style="list-style-type: none"> <li>PBSS Assignment 3 due 11/13 by 10:00pm</li> </ul>
<b>SECTION III: TRANSFORMING THE BLACK BOX OF PUBLIC BUDGETING</b>		
<b>Date</b>	<b>Topic</b>	<b>Readings &amp; Assignments</b>
<p><b>Week 12</b> Nov. 15 – Nov. 21</p>	<p><b>Transformation in an American City</b></p>	<p><b>Read:</b></p> <ul style="list-style-type: none"> <li>AK, p. 1-149</li> </ul>

	<p><i>"Don't tell me what you value, show me your budget, and I'll tell you what you value."</i> – Joe Biden</p>	<p><b>Due:</b></p> <ul style="list-style-type: none"> <li>• Work on PBSS Assignment 4</li> </ul>
<p><b>Week 13</b> Nov. 22 – Nov. 28 <i>Thanksgiving Nov. 25</i> <i>(University Holiday)</i></p>	<p><b>Thanksgiving Break</b></p>	
<p><b>Week 14</b> Nov. 29 – Dec. 5</p>	<p><b>Alternative Approaches The Future of Public Budgeting</b></p> <p><i>"We do not have a money problem in America. We have a values and priorities problem."</i> – Marian Wright Edelman</p>	<p><b>Read:</b></p> <ul style="list-style-type: none"> <li>• AK, p. 149-239</li> </ul> <p><b>Due:</b></p> <ul style="list-style-type: none"> <li>• Socratic Circle discussion via Zoom (link in Moodle, <a href="#">come during the time you signed up for</a>)</li> <li>• Socratic Circle discussion questions due via Moodle by 11/29 at 10:00am ← <b>note the day/time</b></li> </ul>
<p><b>Week 15</b> Dec. 6 – Dec. 12</p>	<p><b>From Black Box Budgeting to Participatory Transparency Final Work Due</b></p> <p><i>"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."</i> – Gretchen Whitmer</p>	<p><b>Watch:</b></p> <ul style="list-style-type: none"> <li>• <i>The Gateway Drug to Democracy</i></li> </ul> <p><b>Due:</b></p> <ul style="list-style-type: none"> <li>• PBSS Assignment 4 due 12/11 by 10:00pm</li> <li>• Retrospective discussion <ul style="list-style-type: none"> <li>• Initial post by 12/8 at 10:00pm</li> <li>• Discussion closes 12/11 at 10:00pm</li> </ul> </li> <li>• Turn in self- and peer-assessment by 12/11 at 10:00pm <i>if you worked with a partner</i></li> <li>• Complete end-of-semester learning evaluation (sent from Moodle)</li> </ul>

## 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 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 not 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 class 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 campus 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:

<b>Discussion Expectations (Weeks 1, 2, 5, 8, &amp; 15)</b>
My expectations for discussion can be summarized as including: <ul style="list-style-type: none"><li>- <u>Quality over quantity</u> (I do not have a minimum/maximum number of required posts; however, I expect us to engage in a thoughtful and challenging <i>dialogue</i>. Please note the deadlines for initial discussion posts throughout the syllabus.</li><li>- <u>No “posting and ghosting”</u> (that is, dialogue)</li><li>- <u>Remain on topic</u></li><li>- <u>Utilize evidence (i.e., empiricism)</u> - cite course materials, outside reliable sources</li><li>- <u>Professionalism and respect</u></li><li>- <u>Inclusion, an open mind, and challenging ourselves</u></li></ul>
<b>Week 1: Introduction (discussion closes 9/4 at 10:00pm)</b>
Let’s get to know one another
Introduce yourself in the appropriate location and get to know the members of this class (this is a good time to begin thinking about the PBSS and a partner)
<b>Week 2: Priorities (media posted to Moodle by 9/8 at 10:00pm, discussion closes 9/11 at 10:00pm)</b>
Priorities: What do you value? How do we know?
Reflect on your personal values. What matters to you? What personal ethos guides your decision-making?
<ul style="list-style-type: none"><li>- Identify no more than six values that you think should be central to the practice of public budgeting</li><li>- Consider why these values are important (write notes)</li><li>- Explore the significance of the values you identify to the practice of public administration</li><li>- In the Week 2 Moodle discussion, post an image, short video clip, audio recording, or other representation that illustrates the values you identified. Be prepared to offer commentary on the connection between the media you selected and the values you identified.</li></ul>
<b>Week 5: Values, Tradeoffs, and Choices (initial post by 9/29 at 10:00pm, discussion closes 10/2 at 10:00pm)</b>
Values, Tradeoffs, and Choices: after playing the Fiscal Ship and completing PBSS Assignment 1, reflect on your experience and discuss
<ul style="list-style-type: none"><li>- What happened in your simulation?</li><li>- How the ideas of personal and societal values interact with policy tradeoffs and choices?</li><li>- The DEI and political context inherent in budgeting</li></ul>

<b>Week 8: Budget Methods/Approaches (initial post by 10/20 at 10:00pm, discussion closes 10/23 at 10:00pm)</b>
Compile a method/approach memo resource
This week, you will share your budget memo from PBSS Assignment 2 with a small group on Moodle. Each group will have at least one budget memo for each approach. You're encouraged to save your colleagues' memos for future reference.
<ul style="list-style-type: none"> <li>- Post your PBSS Assignment 2 memo as a discussion post <u>and as an attachment</u> in your small group</li> <li>- Identify similarities and differences between approaches</li> <li>- Discuss with your classmates the connections and conflicts in methods/approaches you see</li> </ul>

<b>Week 10: TRIVIA! 11/2 at 5:30pm via Zoom</b>
Friendly, team-based trivia with both Dr. Barsky & Dr. Bridge's PUAD 505 classes
You will <a href="#">sign-up for a trivia team</a> of 4-6 people during Week 8
<ul style="list-style-type: none"> <li>- Attend and participate in public budgeting Zoom trivia</li> <li>- Have fun, reflect on what you know now compared to entering the course during Week 1</li> </ul>

<b>Week 14: Socratic Circle Questions (due via Moodle by 11/29 at 10:00am, come to your <a href="#">discussion group</a> ready to discuss the book)</b>
<i>City on the Line</i> : 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, <i>City on the Line</i> . To prepare, read the assigned AK pages for the week as well as the Socratic Circle information (in Moodle), then:
<ul style="list-style-type: none"> <li>- Compose two thoughtful discussion questions that engage the Andrew Kleine text. Submit your questions on Moodle by 10:00am on Monday of Week 14.</li> <li>- Arrive to your Zoom Socratic Circle, on-time and with your questions and reading notes to our discussion</li> <li>- Actively participate in the discussion, engaging your peers in a course material-based conversation</li> </ul>

<b>Week 15: Retrospective (initial post by 12/8 at 10:00pm, discussion closes 12/11 at 10:00pm)</b>
Retrospective: what have you learned? How will you use this in your life outside DPAP?
Reflect on our time together this semester and our consideration of public budgeting and finance. Although many of you may not become budget directors, you will always be impacted by public budgets (at home, at work, at school). Consider how you can move skills you learned in this class to your thinking, learning, or practice after the semester.
<ul style="list-style-type: none"> <li>- Compose a few sentences addressing the question/prompt above</li> <li>- Post these, along with a meme of your own creation to our Moodle discussion</li> </ul>

## 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 1, 2, and 3](#) (working with the same individual on each assignment). Regardless of whether you work in a team this term, Assignment 4 will be completed individually.

### Assignment 1: Floating the Fiscal Ship (Due Sept. 25 at 10:00pm 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:

<b>First</b>	Choose three broad governing goals from those provided
<b>Then</b>	Play the Fiscal Ship (the simulation will take at least an hour, plan accordingly)
<b>Next</b>	<p>In 4-5 double-spaced pages (not including reference list):</p> <ul style="list-style-type: none"><li>• Identify the governing goals you selected and explain why you choose them. Consider who the goals benefit and who they disadvantage</li><li>• 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? Were any of your governing goals at odds with one another? What about societal or your personal values?</li><li>• 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</li></ul>
<b>Include</b>	Reference at least two 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 Oct. 16 at 10:00pm 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. To complete this assignment:

<b>First</b>	Read your assigned reading(s)
<b>Then</b>	Review the memo-writing guides <a href="#">here</a> and <a href="#">here</a>
<b>Next</b>	<p>Construct a polished, 1-2 page <u>single-spaced</u> memo (not counting references) that:</p> <ul style="list-style-type: none"><li>• Synthesizes the budget method/approach</li><li>• Explains the central claim(s) or thesis (i.e., identification of <i>why</i> someone would use this approach and <i>what</i> the approach claims to do)</li><li>• Identifies and explains key terms</li><li>• Provides commentary on how the approach is used. What are its strengths? What are its weaknesses?</li></ul>

	<ul style="list-style-type: none"> <li>Offers an example of how the method is used in practice. <i>This example <u>should not</u> come from your primary source reading(s), but from outside investigation</i></li> </ul> Provide enough detail in your memo so that someone who has not read your article(s) can understand the key points
<b>Include</b>	Appropriate citation and references, memo formatting

### Assignment 3: Building a Public Budget (Due Nov. 13 at 10:00pm 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:

<b>First</b>	Review and download all of the exercise forms
<b>Then</b>	Develop a complete FY 1 budget request for the County Library
<b>Next</b>	Compose a 4-5 page, double-spaced paper (not including the Appendix) that: <ul style="list-style-type: none"> <li>Includes the values or priorities that guided your budget decision-making process</li> <li>Explains <i>why</i> you made the budget choices that you did</li> <li>Identifies if you achieved the mandated three percent savings. If so, how did you accomplish this? If not, why?</li> <li>Explores the strengths and weaknesses of the line-item budget format</li> <li>Addresses if there is any information you would have liked to have that was not provided and <i>why</i> this information is important</li> <li>Articulates the questions you think members of the Board of Supervisors <u>and</u> public should consider when reviewing your proposed budget</li> </ul> Attach your complete budget as a <u>table</u> identifying categories (lines) and allocations as an Appendix to your paper
<b>Include</b>	At least two references to course materials (appropriately cited) in your paper. Don't forget to include references to your Appendix (i.e., proposed budget) in-text

### Assignment 4: Synthesis Reflection (Due Dec. 11 at 10:00pm 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. This assignment (Assignment 4) will appear at the beginning of your compendium, followed by Assignments 1, 2, and 3. To complete this assignment:

<b>First</b>	Complete any revisions to your Assignment 1, 2, and 3
<b>Then</b>	Reflect on your learning and skill development and practice in this class
<b>Next</b>	Write 4-5 double-spaced pages (not including references) that: <ul style="list-style-type: none"> <li>Reflects on the theories and skills you learned in this class</li> <li>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</li> <li>Explores how the politics of public budgeting affects public administration and policy</li> <li>Addresses how the public itself should be considered in developing and funding public priorities</li> </ul>

	<ul style="list-style-type: none"> <li>• Discusses the connection between values, budgets, and equity</li> <li>• Recommendations you have for the future of public budgeting and what steps should be taken</li> </ul>
<b>Include</b>	At least five references to course materials (appropriately cited), page numbers that accurately correspond to the table of contents