Instructor
Fernando Costa
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Office hours: After each class by appointment.

Course Description
This course explores local government budget and finance policies as they serve to fund capital improvements, promote economic and community development, influence land use decisions, and otherwise implement local comprehensive plans. Topics include financial trends affecting local governments; budgets, capital improvement programs, and other management tools; issues associated with various revenue sources; economic development programs as they affect the local tax base; and the fiscal impact of land development policies and projects. The course also examines contemporary issues facing American cities as a consequence of global economic trends as well as federal and state fiscal policies. Designed primarily for second-year RCPL students, the course enables students to become more effective planners by linking the planning function to budgeting and finance activities. The course is also suitable for graduate students in political science, public administration, and related social sciences. By emphasizing plan implementation methods, this course partially fulfills the Planning Accreditation Board curriculum requirement pertaining to plan creation and implementation.

Textbooks


Assignments
Recognizing the importance of communication skills to a planner’s success, the course requires each student to produce three short essays (each three to five double-spaced pages in length) on assigned
readings and a longer research paper (approximately twenty double-spaced pages) on a topic associated with local government budgeting and finance. The course also requires each student to present his or her research paper orally, using any visual aids that might enhance the presentation. Class participation is essential, and each student is required to demonstrate leadership skills by facilitating three or more discussions on assigned readings. The instructor expects students to attend all classes, to complete all assignments on time, and to produce work of professional quality.

**Grading System**

<table>
<thead>
<tr>
<th>Component</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Essays (3 @ 5%)</td>
<td>15%</td>
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<tr>
<td>Research paper</td>
<td>30%</td>
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<tr>
<td>Presentation</td>
<td>10%</td>
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<tr>
<td>Class participation</td>
<td>15%</td>
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<tr>
<td>Attendance and punctuality</td>
<td>10%</td>
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<td>Final exam</td>
<td>20%</td>
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<td><strong>Total</strong></td>
<td><strong>100%</strong></td>
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**Schedule of Classes**

1. **August 29**
   b. Guest speaker: Anthony M. Francisco, Finance Director, City of Norman, on budgeting, general obligation bonds, and tax increment financing (1:30 p.m.)
   c. Case studies: Fort Worth budget and capital improvement program.
   d. Assigned readings: Bartle, chapters 1 through 3; Ingram, chapters 1 through 5.
   e. Work to be submitted: None.

2. **September 26**
   a. Topics: Budgets, capital improvement programs, and other management tools. Infrastructure funding.
   b. Guest speaker: Craig Freeman, Finance Director, City of Oklahoma City, on budgeting, strategic planning, and performance measurement (1:30 p.m.)
   c. Case studies: Fort Worth development impact fees, storm water utility, and transportation utility.
   d. Assigned readings: Bartle, chapters 4, 6, 11, and 12; Ingram, chapters 6 through 8, 13, and 14.
   e. Work to be submitted: Essay # 1; draft proposal for research paper.

3. **October 17**
   b. Guest speakers: A.J. Kirkpatrick, Director of Operations and Planning, and Jill DeLozier, Director of Marketing and Communications, Downtown Oklahoma City, Inc., on business improvement districts and public/private partnerships (10:00 a.m.) and Justin Erickson, City Manager, City of Shawnee, on infrastructure funding and economic development (1:30 p.m.)
c. Case studies: Economic development tools, including tax abatement, tax increment financing, and public improvement districts; Fort Worth’s urban village development program.
d. Assigned readings: Bartle, chapters 8 through 10, 14, and 16; Ingram, chapters 9 through 12, 15, and 16.
e. Work to be submitted: Essay # 2; final proposal for research paper, including bibliography.

4. October 31
b. Guest speakers: Julie Miner, Principal Economic Development Planner, Indian Nations Council of Governments, Tulsa, on tools to promote economic development and historic preservation (10:00 a.m.); and Mike Southard, President and CEO, Ada Jobs Foundation, on economic development programs (1:30 p.m.)
d. Assigned readings: Burchell, chapters 1 through 12; Bise, chapters 1 through 8.
e. Work to be submitted: Essay # 3.

5. November 14
a. Topics: Presentation of research papers. Final exam.
b. Guest speakers: None.
c. Case studies: None.
d. Assigned readings: None.
e. Work to be submitted: Research paper.

December 5 shall be a contingency meeting date in the event that inclement weather or other circumstances require the cancellation of any class.

Standards of Behavior
Each student shall comply with the University’s codes, policies, and procedures dealing with academic misconduct, grievances, sexual and ethnic harassment, and discrimination based on physical disability. Any student engaging in academic misconduct shall receive no credit for the pertinent assignment and shall receive a grade no higher than C for the course.

Accommodation
Any student with a disability that may prevent him or her from fully demonstrating his or her abilities should contact the instructor as soon as possible to discuss accommodations that may be necessary to ensure the student’s full participation and facilitate the student’s educational opportunities.

Religious Holidays
It is the policy of the University to excuse the absences of students that result from religious observances and to provide without penalty for the rescheduling of examinations and additional required classwork that may fall on religious holidays.
Adjustments for Pregnancy/Childbirth Related Issues
Should you need modifications or adjustments to your course requirements because of documented pregnancy-related or childbirth-related issues, please contact me as soon as possible to discuss. Generally, modifications will be made where medically necessary and similar in scope to accommodations based on temporary disability. Please see www.ou.edu/content/eoo/pregnancyfaqs.html for commonly asked questions.

Title IX Resources
For any concerns regarding gender-based discrimination, sexual harassment, sexual misconduct, stalking, or intimate partner violence, the University offers a variety of resources, including advocates on-call 24.7, counseling services, mutual no contact orders, scheduling adjustments and disciplinary sanctions against the perpetrator. Please contact the Sexual Misconduct Office 405-325-2215 (8-5) or the Sexual Assault Response Team 405-615-0013 (24.7) to learn more or to report an incident.

11/1/15