

UEP Policy and Planning Competency Grid

Course Name/Number: Local Government Finance, UEP 294-A
Spring

Instructor:

Jon Witten

Semester:

a) Knowledge Competencies	Specific sub-competencies or examples as developed in this course
1. History, structure, function of urban and metropolitan settlements	Moderate focus: discussion of traditional and historic methods of financing local government and the impacts on urban growth and development since the 1800s. Discussion on the heavy reliance on the property tax and its effect on growth and development in states without income taxes, in states with “property tax reform” programs and in states that have not authorized the use of impact fees on new growth.
2. Economic influences on policy and planning (e.g. ‘market’ and ‘polis’ relationships)	Moderate focus: emphasis on traditional and “creative” approaches to financing local government, historically and presently, with discussion on the impact these approaches have and will have on local government policy and planning efforts.
3. Environmental, social and cultural influences on policy and planning	
4. Understanding different roles in policy and planning	Heavy emphasis on the roles played at the local level of government as enabled by state constitutions and statutory approvals.
i) Levels of government	Heavy emphasis on the reliance of state and local government for limited tax dollars with particular focus on the property tax and property tax “revolts” in California and Massachusetts.
ii) Governance structures	
iii) Citizens and residents	Heavy emphasis on the responses of citizen organizations to tax programs, particularly the property tax. Emphasis on the responses to new taxation approaches, including impact fees, by the development community and the claim that such fees are disguised taxes. Discussion and review of judicial responses to these claims.
iv) NGOs	
5. History, theory and processes of policymaking	
6. History, theory and process of planning	Heavy emphasis on the use of the array of techniques used by local governments to finance required and optional services, judicial holdings with respect to distinguishing between the two, the growth of “gated communities” and the resulting impacts on tax revenue raising abilities at the local governmental level.

7. Implementation of policy and planning	Heavy emphasis on how the use of taxes and fees shape growth and development, alter long-range comprehensive plans and impact the provision of municipal services.
8. Evaluation of policy and planning	Heavy emphasis on the statutory framework authorizing or prohibiting revenue raising techniques relied upon by local governments to fund municipal services.
9. Administrative and legal aspects of policy	Heavy emphasis on the legal aspects of local government financing. Detailed analysis of appellate case law throughout the country with regard to use of fees versus taxes, use of impact fees, restrictions on local government's ability to borrow and bond, the referendum approach in states such as California and discussion of the full array of financing techniques available to local governments to fund municipal services.
10. Administrative and legal aspects of planning	Please see above.
11. Politics of policy and planning	Moderate focus on the political influences that shape taxation policy such as the use or prohibition of impact fees, reliance on the property tax versus the income tax and the impacts of "gated communities" on the provision of municipal services/

b) Skills Competencies	Specific sub-competencies or examples as developed in this course
1. Critical thinking	
i) Defining problem	Major focus: students select one of several local government finance "problems" from across the country to define, analyze and develop solutions, relying on appellate case law holdings or where the courts have not opined, from the perspective of local government officials.
ii) Documenting the extent of a problem	
iii) Documenting the political and social context	
iv) Documenting the environmental and spatial context	
v) Identifying possible analysis strategies and their implications	
vi) Identifying criteria for proposing solutions	Major focus: students are required to research complex local government finance problems to suggest solutions to proposed (both "real" and "simulated") problems.
vii) Identifying criteria for selecting solutions	Major focus: students are required to propose recommendations to complex local government finance issues using a combination of policy, law and common sense political responses to client needs and concerns.

viii) Evaluating the development and results of policies and plans	
2. Research skills	
i) Understanding research design	
ii) Collecting relevant literature	Major focus, with literature being defined in this course by appellate state and federal case law regarding the breadth of local government powers to raise revenue and/or expend money.
iii) Analyzing relevant literature	Please see above.
iv) Identifying and assessing data sources and limitations	
v) Developing data collection instruments and tools	
3. Data Analysis skills	
i) Interpreting and synthesizing data	
ii) Drawing inferences from specific observations to make	
iii) More generalizable findings	
iv) Comparative analysis	
v) Longitudinal analysis	
vi) Recognizing and accounting for limitations to findings	
4. Qualitative Analysis skills	
i) Direct observation	
ii) Analysis of primary qualitative data	

iii) Analysis of secondary qualitative data	
5. Quantitative Analysis skills	
i) Descriptive statistics	
ii) Inferential statistics	
iii) Basic forecasting	Major focus: significant discussion and analysis regarding the use of impact fees for revenue generation and the required methodology that the courts have demanded be applied.
iv) Use of spreadsheets and statistical software	
6. Spatial Analysis skills	
i) Understand how to identify spatial problems and frame spatial questions for analysis and research	
ii) Use Geographic Information System for basic spatial analysis and mapping	
7. Communication skills	
i) Writing skills	Major focus. Students draft a significant research paper on a specific local government finance problem, relying principally on appellate case law.
ii) Speaking skills	Major focus. Students are expected to participate in detailed case analysis and relate the same to specific local government finance issues and problems.
iii) Graphic presentation skills	
iv) Presentation strategies and methods	Moderate focus with discussion as to how local and regional planners can be persuasive before administrative and judicial tribunals in a matter involving local government finance.

c) Policy and Planning in Practice Competencies	Specific sub-competencies or examples as developed in this course
1. Collaboration skills i) Negotiation	
ii) Group project management	
iii) Group problem solving	
iv) Perspective-taking	
v) Adaptability, flexibility	
vi) Networking	
2. Organizational management skills i) Decision making	Major focus: students are trained to think as government and private/non profit planners do with respect to local government finance and expenditure problems, particularly in light of limited fiscal resources and pressures on local officials to spend tax dollars wisely and efficiently.
ii) Strategic problem solving and adapting to change	
iii) Human resource development	
iv) Financial management and resource development	
3. Political and economic power mapping skills i) Understanding political and economic power structures and dynamics	
ii) Modes of influencing their use	

4. Ethical and professional behavior skills

i) Understanding and upholding the role of ethics and accountability in professional policy and planning processes, practices, and behavior