PAD 642

(70 points)

Assignment Overview

Over the semester, you completed a series of applied budgeting tasks involving local government budgets, local revenues, local expenditures, the New York State Executive Budget, legislative budget hearings, capital projects, debt, and federal/state aid. For the final assignment, you will turn your previous work into a professional budget analysis portfolio. This portfolio should present selected evidence of your ability to analyze real government budgets and communicate findings clearly.

So, what is a professional portfolio? *See this post Link.*

This is not a traditional term paper. It is a polished professional work sample that demonstrates what you can do as a beginning budget analyst, policy analyst, public finance analyst, legislative staff member, or public/nonprofit manager.

You should use work you have already completed in the previous assignments. You may revise, shorten, reorganize, and polish earlier material.

Final Product

Your portfolio should include:

- Professional profile statement (0.5 page)
- Local government budget work sample (2-3 pages)
- New York State budget work sample (2-3 pages)
- Summary table of technical skills (0.5-1 page)
- Final professional reflection (0.5-1 page)

You should include selected analysis from previous assignments, such as a revenue chart, expenditure benchmark table, capital project table, aid table, or debt summary.

Portfolio Structure

1. Professional Profile Statement (0.5 page)

Begin with a short professional statement. This section should explain:

- What type of budget analysis you completed in this course.
- What governments or policy areas you studied.
- What skills this portfolio demonstrates.

2. Work Sample 1: Local Government Budget Analysis (2-3 pages)

This section should present a polished version of your local government budget analysis. Think of it as a professional work sample that could be read by a city manager, county administrator, budget officer, or nonprofit leader.

Note: Include sample charts or tables from your local government analysis, such as revenue composition chart, revenue trend chart, revenue forecast table, expenditure benchmark table, etc.

3. Work Sample 2: New York State Budget and Policy Analysis (2-3 pages)

This section should present a polished version of your New York State budget analysis. Think of it as a short professional briefing for a legislative office, state agency, advocacy organization, or public affairs team.

Note: Include sample charts or tables from your state budget analysis, such as program proposal table, legislative hearing issue table, capital project summary table, debt or credit rating summary, federal/state aid table.

4. Summary of Professional Skills (0.5-1 page)

Create a short table like the one below.

My Professional Skill	Evidence from This Portfolio (provide more details specific to your own work)
Budget document analysis	I reviewed local and state budget documents to identify major revenues, expenditures, programs, and capital projects.
Revenue analysis and forecasting	I calculated revenue composition and prepared a simple 3–5 year revenue forecast.
Expenditure benchmarking	I compared per capita spending with similar governments and identified potential cutback areas.
Policy and fiscal analysis	I connected proposed spending to policy goals, beneficiaries, and legislative concerns.
Capital and debt analysis	I examined capital projects, funding sources, and the role of debt in long-term planning.
Intergovernmental aid analysis	I analyzed how federal and state aid affect local and state budgeting.
Professional communication	I summarized findings in memo-style writing with charts and tables.

Feel free to provide specific information, add more skills, and adapt this table based on your own work.

5. Summary and Final Professional Reflection (0.5-1 page)

End with a short reflection focused on professional growth.

- What is the most important budgeting skill you developed in this course?
- How would you describe this project in a job interview?

- What kind of public-sector or nonprofit work could use these skills?

Appendix: Grading rubrics

Component	Points	Evaluation Criteria
Professional Profile Statement	8	Clearly describes the budget analysis completed, governments/policy areas studied, skills demonstrated.
Local Government Budget Work Sample	16	Presents polished local budget analysis with major revenue/expenditure findings, charts or tables, clear explanation of the analysis, and connection to course work.
NYS Budget and Policy Work Sample	16	Presents polished NYS budget analysis with relevant budget items, hearings, capital projects, debt, and aid; includes charts or tables; connection to course work.
Use of Evidence, Charts, and Tables	8	Uses evidence from prior assignments and budget documents; charts/tables are clear, labeled, and integrated into the analysis.
Summary of Professional Skills	8	Includes a skills table identifying budgeting/public finance skills and specific evidence from the student's own portfolio.
Final Professional Reflection	8	Reflects on the most important skill learned, how to describe the portfolio in a job interview, and how these skills apply to public-sector or nonprofit work.
Organization and Writing	6	Follows the required structure, revises prior work into a polished portfolio, uses consistent formatting, and is clear and proofread.