SYLLABUS

Philanthropy and Equity Policy Lab
PPHA 60000-3
Spring Quarter 2023
Mondays, 3:00pm - 5:50 pm CST (in person)

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Course Description:
The Spring Quarter 2023 Philanthropy and Equity Policy Lab will focus on efforts by Chicago’s largest philanthropic organizations to advance equity and inclusivity in the Chicago metropolitan region. Students will be divided into three teams, and each team will be assigned to work on a project for a client organization for the duration of the quarter. Under the guidance of the Faculty Advisor, Shelley Davis, and with support from the Professional Advisor, teams will conduct research and analysis, draw conclusions, and present final deliverables to client leadership at the conclusion of the quarter. Client meetings will occur throughout the quarter as needed.

The two Spring Quarter 2023 clients for this Policy Lab are The Chicago Community Trust and The MacArthur Foundation. While these foundations are structured differently, they both work to support and improve the communities and residents in the regions they serve.

Each enrolled student will be a team member on one of the following projects, project scopes that describe these projects in more detail will be shared at the beginning of the quarter:

Client: Chicago Community Trust
Projects: Understanding Systemic Inequities in the Home Appraisal Process and Defining Early Progress towards Closing the Racial Wealth Gap through Economic Recovery

Client: MacArthur Foundation
Project: Establishing a Social Indicators Dashboard for Chicago Neighborhoods
Learning Objectives:

Before itemizing any specifics, it is worth emphasizing how this class differs from many others at Harris. In a nutshell, in the Harris Policy Labs program we both fear and embrace the idea that the “path of learning goes through the swamp of confusion.”¹


In other words, the Policy Labs experience can be messy and even scary! There are no problem sets or exams, and there are few clear-cut and specific “problems” to solve. In that sense, the course is intended to provide a taste of real-world policy analysis and policymaking, albeit with the structure of a course, advisors, and other supports.

We intend that by the end of this course, students will:

- Learn or enhance capacity to work with incomplete data, conflicting priorities, and other ambiguities in order to deliver a high-quality product
- Learn or enhance capacity to manage a complex project from inception to completion
- Develop or enhance teamwork, communication, and project management skills
- Demonstrate in-depth knowledge of the assigned policy area by researching, analyzing, and synthesizing data related to the topic, drawing conclusions from the analysis, and developing concrete policy recommendations
- Collaborate extensively with fellow students, faculty advisors, and clients to develop and produce high-quality deliverables that provide useful information to the client and meet the client’s needs
- Develop or enhance oral and writing skills by delivering final analysis and recommendations to the client organization in the form of a policy memo and presentation

**Prerequisites:**

Second-year students and one-year masters students (not in their first quarter) are eligible to enroll.

**Class Meetings and Weekly Time Commitment:**

Formal class meetings will occur weekly on Mondays, 3:00pm to 5:50pm Central Standard Time in The Keller Center. Class time will include lecture, discussion, breakout sessions with teams, and meeting with clients via Zoom, and, consistent with Harris policies, you are expected to be physically present for all scheduled classes for the full time allotted. Given the rapid pace of these projects, we cannot allow any unexcused absences; in the event of an emergency, we ask that you immediately contact your Advisors via email.

While students can expect this course to meet in-person on a weekly basis, we ask that students inform both the Faculty and Professional Advisors immediately if you experience COVID symptoms, have childcare disruptions, or are required to quarantine. The classroom will be equipped to enable remote participation in these specific instances only. Failure to attend class without notifying me first will be considered an unexcused absence that will have an adverse impact on your attendance/participation score.

Another important point to emphasize: while some of our Monday class time will be devoted to team work on your project, each student should plan to spend **7-10 hours per week** outside of class on the project (this includes independent research, regular team meetings, client meetings outside of class as required, preparing materials, etc.). In-person collaboration for team meetings is highly encouraged but not required.

**Course Structure and Expectations:**

As discussed above, this course is structured differently than a traditional academic course. Class meetings will utilize a combination of seminar format with discussion and occasional guest speakers, time for teamwork and other meetings, and hands-on learning activities in place of traditional, one-way lecture.

Policy Labs are “experiential learning” courses, and we have found that successful experiences for students, advisors, and clients are built on several key elements:

- **Flexibility, communication, and respect are important.** Working on a real project with a client organization is generally not as smooth or as structured as working on a hypothetical assignment or problem set in a class, and generally involves some unpredictability. Expect the unexpected, be flexible, and be courteous and respectful to your teammates, to your client and to accommodating the client’s needs.

- **Expect imperfect and incomplete data—and lack of clarity about your project!** A client will rarely have all of the data needed for a project, and what data are available may be in a terrible format, incomplete, etc. Expect to work with imperfect data, and expect challenges associated with its use. Clients may say one thing in week 2 and another in week 6, complicating your team’s efforts. Frustrating! But remember, your advisors are here to help you work with what you have and/or direct you to other sources as needed, and despite these challenges, we set and maintain high quality standards for the work produced and shared with clients.

- **Confidentiality is critical.** In your work for this class, you will interact with confidential information, including not only confidential data provided by clients but also insights gleaned
from that data and from client meetings. Clients trust us to help them solve difficult problems, and trust that we will not divulge what we learn in ways that could be detrimental to them. Students are required to keep all data and materials shared by the client confidential, as well as to keep the content of conversations with clients in confidence. All students are required to sign a confidentiality pledge at the start of the quarter. **Violation of the pledge may result in academic penalties.**

**Course Materials:**

Background materials, client materials, and a detailed course outline will be posted to Canvas, and students are responsible for any and all material posted there. Students may choose to store and share their work using other platforms as well (Box, Google Drive, etc.).

I encourage the use of email and try to respond in a timely fashion, but **please do not use the Inbox/Messaging feature of Canvas to communicate with me.** I also do not text, tweet, or Facebook message regarding course matters, and I don’t use Slack. So **please check your UNIVERSITY OF CHICAGO email and CANVAS regularly.**

**Deliverables and Grading:**

In some sense, the final work product delivered to the client is the “only” thing that matters. However, these Labs are intended to develop your emerging skills—analytical, communication, interpersonal, and overall professional skills. This means the **process** matters along with the **product.** Furthermore, in this course, you will be evaluated at both the individual and team level. Professor Davis will assign course letter grades after consultation with the Professional Advisor and with input from our clients and your fellow teammates, and these grades will reflect your quarter-long effort, commitment, and engagement; additionally, this course cannot be taken Pass/Fail. Products and processes will be judged on quality and timeliness. More specifically, your course grade will be based on the components listed below; most are “team” items, but some are marked “individual”:

- **20%:** Attendance and active participation in class; this entails being prepared, on-time, professional, and engaged throughout the quarter (individual).
- **10%:** “Process” deliverables, such as:
  - Preparing for client meetings (team)
  - Team contract and project plan (team)
  - Presenting during class and client meetings (individual)
  - End of quarter peer reviews (individual)
- **10%:** Preliminary work products
  - “What is the problem” assignment (individual)
- **10%:** “Milestone” deliverables (team), such as:
  - Drafts of slides
  - Drafts of policy brief
- **50%:** “Final” deliverables (team), such as
  - Policy brief, which likely includes a short “executive summary” as well as technical appendices
  - Presentation
  - In some cases, additional materials (computer programs, Excel files, etc.)
A few other comments about grades:

- I do not use rigid numeric scales for assigning letter grades. Instead, I consider the distribution of scores and aim to assign letter grades to scores in a manner no less generous than the “standard” Harris School grade distribution:
  - A (1/8)
  - A- (1/4)
  - B+ (1/4)
  - B (1/4)
  - B- or lower (1/8)
- Students sometimes wish to request review and regrading of their returned work. If you wish to request reconsideration of your work, please follow these guidelines:
  - All requests must be submitted by email to me, with appropriate files and documentation, along with an explanation of why your work should be reconsidered.
  - All regrade requests should be submitted within one week of having the work returned to students.

General Policies

Below, I’d like to highlight key university and Harris School policies and practices in the key domains of (1) academic integrity; (2) resources available to students; (3) serving students with disabilities; (4) video and audio recording; and (5) diversity and inclusion. Key resources and full, up-to-date formal policies and procedures for the University are here, with Harris-specific materials available in Canvas via the Harris Student Handbook.

Academic integrity:

Principles: All University of Chicago students are expected to uphold the highest standards of academic Integrity and honesty. Among other things, this means that students shall not represent another’s work as their own, use un-allowed materials during exams, or otherwise gain unfair academic advantage.

- The University’s policies regarding academic integrity and dishonesty are described here. It is worth explicitly stating the University’s approach here: “It is contrary to justice, academic integrity, and to the spirit of intellectual inquiry to submit another’s statements or ideas as one's own work. To do so is plagiarism or cheating, offenses punishable under the University’s disciplinary system. Because these offenses undercut the distinctive moral and intellectual character of the University, we take them very seriously.”
- The Harris School’s policies are available in the Harris Student Handbook Canvas site.
  - The Academic Honesty and Plagiarism section expresses the main principles.
  - Detailed guidelines for more specialized student work (e.g., problem sets including computer code) are also provided.
  - Specifically, Harris policies state that:
    - All work submitted by a student must be the student's own original work.
    - Students may not submit previously submitted work from one course (i.e., final paper) to fulfill the academic obligations in another course, unless the student has received permission to do so by the course instructor.
    - Any works that are cited by the student as part of a greater work must utilize proper text and summary citations to properly identify the proper source(s).
    - In the case of group work, students must be prepared to identify their individual
contribution (including proper citations of original work cited) when requested by the course instructor.

**Application of these policies to this class:**

- For writing assignments, please note that all submitted work, whether individually prepared or prepared by a group, must include appropriate attributions. Any and all outside sources relied on must be cited explicitly, and all charts, graphs, and/or tables should include source details. Direct quotations must be indicated as such. In general, I encourage you to consider using a citation manager program to help manage references and bibliographies in your professional lives ([http://guides.lib.uchicago.edu/c.php?g=297307&p=1984557](http://guides.lib.uchicago.edu/c.php?g=297307&p=1984557)). Questions? Please contact me directly.

- For presentations, please use the “Notes” feature of PowerPoint to provide sources and references, slide by slide. You may also include a slide at the end with a full list of references. You must anticipate that your work will be “pulled apart”, with extracts of text, tables, and/or charts, and you must aim to have each slide “stand on its own”, if necessary.

**Consequences:** Violation of these standards generates significant consequences. Students found to have violated the standards will receive a grade of 0 on the assignment in question and cannot earn higher than a B- in the course, regardless of their performance on other assignments and exams. Further, violators will receive a formal letter stating that the student has been found in violation of the code of academic honesty and listing the imposed sanctions. The letter, along with any evidence presented, is archived in Harris Student Affairs records until the student graduates if the student has no other violations. Students found in violation of the academic honesty policy are not permitted to withdraw from the course to avoid grade penalties from the instructor. Repeat offenses face stiffer potential penalties than do first-time offenses.

**Process:** If I and/or the Professional Advisor have reason to suspect a student has violated these academic integrity standards, I will report that suspicion to the Dean of Students, who will meet with me and the student as part of his/her investigation. In most cases, first offenses are adjudicated in this setting. In cases where plagiarism or academic dishonesty is egregious, the case may be referred to the Harris Area Disciplinary Committee even on a first offense. The Dean makes all decisions about which cases will go before the Area Disciplinary Committee. Second violations are referred to the Harris Area Disciplinary Committee, described further [here](http://). If the student is found in violation of academic honesty a second time, the Area Disciplinary Committee can assign sanctions including transcript notes, disciplinary probation, suspension or expulsion from the University.

**Student Support Resources:**

The University has long offered a comprehensive set of student support services (described [here](http://)), including [student health services](http://). And in response to the COVID-19 pandemic and associated disruptions, the University has provided links for students via its “Learning Remotely” [website](http://); specific resources are listed [here](http://). Similarly, the Harris School itself provides both academic and non-academic support services for students. These resources are described (and links provided) on [this page of the Harris website](http://).

If you or someone you know is feeling overwhelmed, depressed, and/or in need of support, remote counseling services are available. Student Counseling Service (SCS) urges you to attend to your mental wellbeing and to reach out to them for support during these challenging times. All SCS services are covered by the Student Life Fee, and there is no additional cost for students to access their services. See [https://wellness.uchicago.edu/mental-health/](https://wellness.uchicago.edu/mental-health/). Students seeking new services/resources can call
773.702.9800 during business hours (Monday–Friday 8:30 a.m.–5 p.m.) and ask to speak with a clinician. **Students needing urgent mental health care can speak with clinicians over the phone 24/7 by calling the SCS at 773.702.3625.**

**Students with Disabilities:**

The University’s policies regarding students with disabilities are available [here](https://disabilities.uchicago.edu). The University of Chicago is committed to ensuring equitable access to our academic programs and services. Students with disabilities who have been approved for the use of academic accommodations by Student Disability Services (SDS) and need a reasonable accommodation(s) to participate fully in this course must follow the [procedures established by the Harris School of Public Policy](https://disabilities.uchicago.edu).

Timely notifications are required to ensure that your accommodations can be implemented. Currently registered students are asked to notify the Harris Student Disability Liaison, Marley Mandelaro ([mbmandelaro@uchicago.edu](mailto:mbmandelaro@uchicago.edu)) of their access requests by the end of the first week of the quarter. The Harris Student Disability Liaison will work with the student and instructor to coordinate the implementation of student accommodations. **Harris students are not required to submit their accommodations letter to the instructor.** Students from other divisions in the University must submit their accommodations letter to Marley Mandelaro ([mbmandelaro@uchicago.edu](mailto:mbmandelaro@uchicago.edu)) in the Harris Dean of Students Office.

Students who are facing extenuating circumstances at any point during the quarter should reach out to their Academic Advisor in the Dean of Students Office for support. If you feel you need accommodations on an ongoing basis, contact Student Disability Services. To contact SDS: website: [disabilities.uchicago.edu](https://disabilities.uchicago.edu) phone: (773) 702-6000 email: [disabilities@uchicago.edu](mailto:disabilities@uchicago.edu).

**Video and Audio Recording:**

The University has developed specific policies and procedures regarding the use of video/audio recordings: these policies are explicitly described in the University’s [student manual](https://disabilities.uchicago.edu) as well as in the guidelines for instructors available **[here](https://disabilities.uchicago.edu).** The basic ideas are clear:

By attending course sessions, students acknowledge that:

- They will not: (i) record, share, or disseminate University of Chicago course sessions, videos, transcripts, audio, or chats; (ii) retain such materials after the end of the course; or (iii) use such materials for any purpose other than in connection with participation in the course.
- They will not share links to University of Chicago course sessions with any persons not authorized to be in the course session. Sharing course materials with persons authorized to be in the relevant course is permitted. Syllabi, handouts, slides, and other documents may be shared at the discretion of the instructor.
- Course recordings, content, and materials may be covered by copyrights held by the University, the instructor, or third parties. Any unauthorized use of such recordings or course materials may violate such copyrights.
- Any violation of this policy will be referred to the Area Dean of Students.
Diversity and Inclusion:

The Harris School welcomes, values, and respects students, faculty, and staff from a wide range of backgrounds and experiences, and we believe that rigorous inquiry and effective public policy problem-solving requires the expression and understanding of diverse viewpoints, experiences, and traditions. The University and the Harris School have developed distinct but overlapping principles and guidelines to ensure that we remain a place where difficult issues are discussed with kindness and respect for all.

- The University’s policies are available here. Specifically, the University identifies the freedom of expression as being “vital to our shared goal of the pursuit of knowledge, as is the right of all members of the community to explore new ideas and learn from one another. To preserve an environment of spirited and open debate, we should all have the opportunity to contribute to intellectual exchanges and participate fully in the life of the University.”
- The Harris School’s commitments to lively, principled, and respectful engagement are available here: “The Harris School of Public Policy welcomes and respects students, faculty, and staff from a wide range of backgrounds, experiences, and perspectives as part of our commitment to building an inclusive community. Fostering an environment that encourages rigorous inquiry and effective public policy problem-solving requires the involvement and understanding of diverse viewpoints, experiences, and traditions. As a leading public policy school, Harris holds diversity as a core value. That includes not only diversity of opinion, but diversity along a broad spectrum of factors, including race, ethnicity, national origin, gender identity, sexual orientation, ability status, religion, socio-economic background, and social or political belief. Recognizing the value of diversity and inclusion is essential to combating discrimination, addressing disparities, and cultivating ethical and clear-eyed policy leadership.”
- Since English language proficiency also varies within the student body, instructors are also encouraged to affirmatively communicate to students, particularly international students, how class participation features in the classroom experience and affects final course grades, since some students have limited experience expressing their ideas in English. Other course components, such as regular TA sessions, TA or instructor office hours, etc. should also be carefully explained since some international students have had little to no previous exposure to the U.S. academic system.