USCPrice

PPD 546 Capstone in Public Administration and Nonprofit Management & Leadership (4 units)

Spring 2024 Tuesdays, 6pm- 9:20pm
Location: Lewis Hall (RGL) 215
Calendly QR Code

Professor: Nicole Esparza

E-Mail: **neesparz@usc.edu**
Office: RGL 208
Office Hours by appointment:
https://calendly.com/neesparz/30min
Office Hours Zoom: **https://usc.zoom.us/j/4884268965**

Course Description

This is the capstone course for the Master in Nonprofit Leadership and Managements (MNLM) and Master of Public Administration (MPA) degrees. The course synthesizes skills and knowledge attained in these programs and assumes that students have completed most of their core courses and management competencies. The primary goal of the course is to give students supervised experience in conducting client-oriented research and analysis. It serves as an important bridge between the classroom and the world of professional practice. This experience will reinforce, through application, the skills developed in the MNLM and MPA programs, and prepare students to enter a professional career.

Prerequisites: MNLM: PPD 542, PPD 675, PPD 689. MPA: PPD 540, PPD 545, (PPD 542 or PPD 557).

Course Learning Objectives

This course requires students to apply the managerial and technical skills they have acquired to analyze complex problems in the public and nonprofit sectors that require both research and managerial reasoning. The overall objectives are:

1. **Professional practice in nonprofit management and public administration.** Conduct research and analysis for a client and produce a professional report. Students will develop the appropriate research design for the project, collect necessary data, apply the analytic skills necessary to address the issue at hand, and produce a well written and analytically sound report. The process and product should demonstrate the key competencies listed below.
2. **Client relations and teamwork.** Develop the interpersonal skills and polish to interact productively with the client. Students will manage teamwork and promote a constructive

consulting relationship with the client. Students will negotiate the consulting relationship with the client to address issues such as expectations for the final report, scheduling of intermediate drafts, and consultation about issues that develop during the work. They will be respectful of the organizational and political environment within which the client operates.

3. **Skill set expertise.** Apply and polish skills required for effective practice, including professional writing and briefing. Students will write the final report in an iterative fashion, producing intermediate products and drafts. In addition, students will be required to give a briefing to the client and invited guests. The briefing and final report should have high production values.

Technical Learning Objectives:

At the end of this course, you will be able to:

- *Scope* research to meet client needs and resolve analytic challenges in the face of ambiguity and competing values.
- *Identify, design, and apply* appropriate research methods to conduct a rigorous research project that is responsive to client needs.
- *Efficiently-manage* an intense, demanding, and collaborative research process.
- *Integrate and apply* knowledge and analytic skills gained in MPA courses.
- *Communicate* complex research findings effectively to both academic and policymaker audiences, and the general public.
- *Provide* new information, analysis, and insight to help inform the policymaking process (defined very broadly).

Degree Core Competencies

By completing the capstone, students will hone and demonstrate the abilities that are identified as universal competencies for all accredited schools of public affairs and administration:

USC Price mission has at its core the following social responsibilities:

- Serve the public good, advance democracy, and improve social justice through research, scholarship, and service.
- Prepare competent administrators of integrity who engage with and advance the interests of diverse communities.

Core Degree Learning Objectives:

- Lead and manage in nonprofit and public organizations.
- Participate in and contribute to the policy process.
- Analyze, synthesize, think critically, solve problems and make decisions.
- Articulate and apply a nonprofit and public service perspective.
- Communicate with a diverse and ever-changing community.

Course Workload

This is an intensive course that requires student teams to work efficiently and effectively to complete an ambitious capstone project in a semester's time. Students should expect to spend three hours a week (Tuesday 6-9pm) in class sessions, meeting with the instructor, or working with their groups. In addition, students will spend an average of 9-10 hours of additional

individual or teamwork each week. Students may need to commit more time to this class at different phases of the project.

Class Standards and Structures

Civility, diversity, and respect. Higher education works best when it becomes a vigorous and lively marketplace of ideas in which all points of view are heard. Free expression in the classroom is an integral part of this process. At the same time, during our classroom discussions and when working in groups, please be: 1. Respectful; 2. Constructive; and 3. Inclusive.

Participation in class workshops. The course is taught in a "blended" format, in which class members will meet together roughly every week on the dates identified in the syllabus. These meetings will be workshops, requiring briefing on projects and group troubleshooting. Students must attend and participate in classroom meetings.

Relatively independent research. During most of the semester, students will be expected to meet regularly as a group, and to arrange meetings as required at the convenience of the client. Once the client has approved the work plan, the team will work independently to conduct the research and analyze results. Grades in the course are given individually.

Submission policies. All assignments must be submitted through Blackboard. In the exceptional cases when students are not able to make the deadline, students should warn the instructor as soon as possible (at least 3 days in advance) with a valid explanation and a reasonable alternative deadline. Unless there are extenuating circumstances, late assignments will be graded down 10% for each day late. Since this course is cumulative, all assignments must be completed.

Team project management. Students are individually responsible for keeping up to date with the assignments and teamwork in accordance with your instructor and client. Individual and team notes, documents, files, drafts, feedback, graphics and other course deliverables must be maintained in an orderly and comprehensive manner within each project, handed in on Blackboard and kept in another project management platform, such as Google Drive, and may be reviewed by the instructor routinely for evaluation.

Role of instructor. The primary work for the course will be the design and completion of client-based projects. The instructor will guide students in this process adopting a role that blends that of a supervisor in a work setting and a professor in an academic setting. Students are expected to keep the instructor updated on the group's progress and consult the instructor on any major decisions or issues the group is facing. In addition, all major parts of the work project (i.e., scope of work, sections of the report, research instruments, etc.) must be reviewed by the instructor before sharing it with clients. Should project workability or client-side issues arise, contact the instructor as soon as possible. We will work out necessary adaptations, maintaining the integrity of the project and the project team.

Client recruitment and assignment of teams. Students will be assigned to a project team that is charged with completing a nonprofit or public administration consultation project for a real client. Before the first course meeting, the instructor recruits clients and identifies the client's broad objectives. The instructor identifies a range of project opportunities that generally match student interest and analytic capabilities. Then the instructor assigns students to project teams. Students are assigned based on a variety of metrics. Once project assignments are made, students are expected to work with the team and client.

Role of the Client. Students need to respect the time of the client and keep their commitment minimal. However, it is up to the client on how much time they devote to the project. Some clients are very "hands-on" and want bi-weekly meetings. A typical project requests the client to commit to the following involvement:

- [Week Jan 16-19 or Jan 22-26] A kickoff meeting with the student team about your organization, ideally held in person. In many cases, teams go on a tour of the organization facilities or review your work. This will also help the student team to refine goals and expectations of the project.
- [Week Jan 30 - Feb 2] Review the student team's scope of work and define deliverables. Provide feedback if they are off track and approve the agreement.
- [Between Feb 12 - April 8] Consultation between the student team and your organization's contact person(s) for clarifying questions and leads. Nonprofits meet about three times with the student team liaison but you can meet more often if you prefer.
- [Week April 10-22] Review a near final draft of the report for your comments.
- [Week April 29- May 3] Student teams present their research to you and ideally the board, provide you with a final report and briefer, their presentation slide deck and a recording of the presentation.

Academic Integrity

The University of Southern California is foremost a learning community committed to fostering successful scholars and researchers dedicated to the pursuit of knowledge and the transmission of ideas. Academic misconduct is in contrast to the university's mission to educate students through a broad array of first-rank academic, professional, and extracurricular programs and includes any act of dishonesty in the submission of academic work (either in draft or final form).

This course will follow the expectations for academic integrity as stated in the USC Student Handbook. All students are expected to submit assignments that are original work and prepared specifically for the course/section in this academic term. You may not submit work written by others or "recycle" work prepared for other courses without obtaining written permission from the instructor(s). Students suspected of engaging in academic misconduct will be reported to the Office of Academic Integrity.

Other violations of academic misconduct include, but are not limited to, cheating, plagiarism, fabrication (e.g., falsifying data), knowingly assisting others in acts of academic dishonesty, and any act that gains or is intended to gain an unfair academic advantage.

The impact of academic dishonesty is far-reaching and is considered a serious offense against the university and could result in outcomes such as failure on the assignment, failure in the course, suspension, or even expulsion from the university.

For more information about academic integrity see the student handbook or the Office of Academic Integrity's website, and university policies on Research and Scholarship Misconduct.

Course Policy on the use of AI Generators

Students are allowed to use artificial intelligence (AI)-powered programs to help with class work unless explicitly stated otherwise.

- *Avoid over-reliance:* Use AI as a complementary tool, not a primary source. While AI tools can be beneficial, you should not overly rely on them. Your primary efforts should be your own, with AI serving to enhance or support your work.
- *Double-check facts:* Proceed with caution when using AI tools and do not assume the information provided is accurate or trustworthy. If it gives you a number or fact, assume it is incorrect unless you either know the correct answer or can verify its accuracy with another source. You will be responsible for any errors or omissions provided by the tool. It works best for topics you understand.
- *Citation:* AI is a tool that you need to acknowledge using. You must cite any AI-generated material (e.g., text, images, etc.) included or referenced in your work and provide the prompts used to generate the content. Using an AI tool to generate content without proper attribution will be treated as plagiarism and reported to the Office of Academic Integrity. When citing AI-generated content, include the name of the AI tool, the date of access, and the prompt used. E.g., "Generated by OpenAI's ChatGPT on [date], based on the prompt: [prompt]."
- *Privacy and data security:* As some AI tools may store data, be aware of privacy concerns when using online AI tools. Avoid inputting personal or sensitive information into these platforms.
- *Collaboration with peers:* If collaborating with peers, ensure that all parties are aware of any AI-generated content used and consent to its inclusion.
- *Ethical considerations***:** Consider the ethical implications of using AI tools, especially when working on topics that require a human touch or empathy. AI doesn't have emotions or inherent ethical guidelines, so the responsibility lies with you.

Human Subjects Compliance and Review

At USC, students involved in classroom assignments must follow the University's Code of Ethics and the USC Human Subjects Protection Program Policies and Procedures when designing and conducting projects with human volunteers. Faculty members assigning projects in research methods classes are expected to help students understand the requirements for IRB review and the ethical obligations toward anyone with whom they interact to complete their assignments.

Students are expected to pursue research ethically and in compliance with the university's codes regarding human subject protections. Human subject means a living individual about whom an investigator conducting research obtains (a) data through intervention or interaction with the individual; or (b) identifiable private information. Any interactions with individuals are expected to consist of expert interviews intended to collect information about organizations and other processes, not information about the respondent/person. If the data collection methods is denied "human subjects" research, students must follow USC IRB review procedures under the supervision of the instructor. https://hrpp.usc.edu/

Capstone Assignments and Due Dates

Assignments	Due Date	% of Final Grade
Participation	Ongoing	5%
Working with Group (class, meetings, etc.)	Ongoing	5%
Self and Peer Reflections Surveys	Ongoing	-
Scope of Work	21-Jan	5%
Capstone Mini-Critique	21-Jan	2%
Client Profile	28-Jan	3%
Team Profile & Work Plan	28-Jan	5%
Project Prospectus	11-Feb	10%
Individual Progress Report	3-Mar	10%
Individual Draft Sections	17-Mar	20%
Draft Report	1-Apr	20%
Feedback from Exchange Rough Draft	7-Apr	-
Final Report	14-Apr	-
Practice Presentation & Briefer	23-Apr	-
Final Client Deliverables	April 28 - May 5	15%
Total		**100%**

Grading Scale

Final grades are individual and letter grade is determined using the following scale:

A	95-100	C	73-76
A-	90-94	C-	70-72
B+	87-89	D+	67-69
B	83-86	D	63-66
B-	80-82	D-	60-62
C+	77-79	F	59 and below

Description of Major Assignments

Here are brief descriptions of the major assignments. We will discuss each assignment and instructions in class. Instructions and examples are on Blackboard.

Scope of Work (SOW): Using feedback received at the preliminary meeting with the client, students will prepare a Scope of Work (SOW) agreement. The client will be aware that the research begins only after they have signed off on the SOW.

(Individual) Client Profile: Each student will provide a short (less than 1 page) description of their client, the client's preliminary question(s), and their understanding of the context (i.e. Why do they want this question answered? What will they hope to do with the analysis you provide to them?)

Team Profile & Work Plan: Teams will develop a written intra-group agreement that articulates how they will operate as a team.

Project Prospectus: Provide a memo (~5 pgs) that provides a problem statement, research questions or aims, preliminary study design, research design matrix, responsibilities, and timeline.

(Individual) Progress Memo: Each student will write a memo on their individual progress on the capstone thus far. Students should detail their individual contribution and include ALL of the work. Include group meetings, communications with client, etc. Also provide drafts of writing, notes, data collection, and a proposed timeline to complete their capstone portion.

(Individual) Draft Sections: Each student will provide a draft of their report sections.

Draft Report: The team will provide a completed (or as much as they have completed) draft report. It should include the issue statement, research aims, background, research design, findings, and recommendations. This draft will be shared with the client.

Final Report: The team will submit a final report to the instructor prior to the client presentation.

Final Client Deliverables: The team will present the final deliverables to the client as per the SOW. Normally it includes:
- *Briefing/Presentation.* Teams will present a 1-hour presentation to their client and get feedback.
- *Short communications briefer.* A visual executive summary (~4 pages) of the report for the client. It is a synopsizes of the report in a reader-friendly and professional manner, with excellent graphic elements.
- *Final Report.* Teams will provide their client with a final report. The length is dependent on the specific project.

Detailed Course Schedule

Week 0	Preparation for Capstone

Due by January 1

- Submit a resume that will be given to the client.
- Complete survey of skill set, previous courses, and preferences.

Week 1, Jan 9	Overview of Course, Learning Objectives, & Expectations

Learning Objectives

- Overview of the course and objectives
- Understanding the role of client-oriented research
- Finalizing capstone project teams

Readings

Powell, D. C., Saint-Germain, M., & Sundstrom, L.-M. (2014). Using a Capstone Case Study to Assess Student Learning on NASPAA Competencies. *Journal of Public Affairs Education*, 20(2), 151–162.

McGaw, D., & Weschler, L. (1999). Romancing the Capstone: The Jewel of Public Value. *Journal of Public Affairs Education*, 2, 89-105.

Week 2, Jan 16	Communication with Client & Scope of Work	After Class Meetings (20 min each)
Learning Objectives - Communicating effectively with client. - Managing client expectations - Creating a Scope of Work (SOW).		Group 1 Group 2 Group 3 Group 4 Group 5

Readings

Schachter, D.R., & Schwartz, D. (2009). The Value of Capstone Projects to Participating Client Agencies. *Journal of Public Affairs Education*, 15(4), 445-462.

Nelson, B., & Economy, P. (2008). Selections from Chapter 7 & 18. In *Consulting for Dummies.* John Wiley & Sons, Inc.

Mackay, J. (2018). 9 Steps to Write a Scope of Work (SOW) for Any Project and Industry. *Planio Blog,* September 6, 2018 https://plan.io/blog/scope-of-work/

Ongoing

- Meetings with client (1/12-1/26)

Week 3, Jan 23　　　Teamwork & Project Management	After Class (20 min)
Learning Objectives • Project Management for teams • Planning and scheduling the capstone project • Setting milestones and deadlines • Effective project management tools (Google Docs)	Group 2 Group 3 Group 4 Group 5 Group 1

Readings

USC LinkedIn Learning Course: "Communications with Teams." (36m)

More readings TBA

Due Sunday January 21ˢᵗ

• Draft of Scope of Work (do not send to client until sign off by instructor)
• (Individual) Mini-critiques of previous capstone reports

Ongoing

• Meetings with client (1/12-1/26)

Week 4, Jan 30　　　Research Aims & Background Research

Learning Objectives

• Crafting research questions, objectives, or aims
• Reviewing relevant literature
• Conducting background research
• Using AI for research

Readings

Nelson, B., & Economy, P. (2008). Chapter 8: Collecting the Client Data You Need. In *Consulting for Dummies.* John Wiley & Sons, Inc.

USC LinkedIn Learning Course: "How to Research and Write Using Generative AI Tools" (1h 13m)

More readings TBA

Due Sunday January 28th

• Client Signed SOW
• (Individual) Client Profile
• Team Profile & Work Plan

Week 5, Feb 6	Research collection & Design Matrix	After Class (20m)
Learning Objectives • Research design and data collections • Design protocols, piloting, and refining instruments. • Discuss key principles in ethical considerations using human subjects. • Discuss the ethical use of data from a social justice lens. • Create Research Design Matrix & Plan		Group 3 Group 4 Group 5 Group 1 Group 2
Readings TBA		
Ongoing • Client Signed SOW		

Week 6, Feb 13	Team Meetings w Me (No Class)	Zoom Meetings (30 min)
Professor's Meeting Objectives • Update on progress • Review prospectus • Prepare for class presentation		6pm 6:30 7pm 7:30 8pm
Due Sunday February 11th • Project Prospectus		

Week 7, Feb 20	Class Presentations on Progress
Class will meet on Zoom & each group will present and get feedback	
Due before class • Presentation ready for class • Read the assigned prospectus for background	

Week 8, Feb 27	Independent Work (No Class)
There is no class. You should be working on your project and individual progress report. If you or your group needs to meet with me, I am available.	

Due Sunday February 25ᵗʰ

- Survey: Self and Peer Reflection #1

Week 9, March 5 Team Meetings with Me (No class)	Zoom Meetings (30m)
Professor's Meeting Objectives • Update on mid-course progress • I will meet with groups as well as meet with individuals.	6pm Group 6:30 7pm 7:30 8pm

Due Sunday March 3ʳᵈ

- Individual Progress Report

Week 10, March 12   Spring Break (No Class)

Week 11, March 19   Writing the Report

Learning Objectives

- Structuring the capstone report
- Writing and formatting guidelines
- Visualizing Data

After lecture, groups will meet face-to-face to discuss progress and steps needed.

Readings

- More readings TBA

- YouTube Video: Visme. (2022). The Complete Guide to Data Visualization. (11m)

Due Sunday March 17ᵗʰ

- (Individual) Rough draft of your section(s)
- Survey: Self and Peer Reflection #2

Week 12, March 26   Independent Work (No Class)

Week 13, April 2   Writing Recommendations

Learning Objectives

- Develop recommendations for client
- Reviewing & editing drafts

Readings

Nelson, B., & Economy, P. (2008). Chapter 9: Problem-Solving and Developing Recommendations. In *Consulting for Dummies.* John Wiley & Sons, Inc.

Due Monday April 1st

- Draft Report
- Email client and set up date for presentation (April 22-May 3)

Week 14, April 9 Team meetings with me (No Class)	Zoom Meetings (30m)
Professor's Meeting Objectives - Update on progress - Rough draft will be given to client ASAP (asking for feedback by April 19)	6pm Group 6:30 7pm 7:30 8pm

Due Sunday April 7th

- (Individual) edits and comments on rough draft exchange

Week 15, April 16 Team meetings with me (No class)	Zoom Meetings (30m)
Professor's Meeting Objectives - Update on progress - Prepare for presentation	6pm Group 6:30 7pm 7:30 8pm

Due Sunday April 14th

- Completed Final Report

Week 16, April 23   Practice Presentations (depending on client: in person or Zoom)

Class will meet in-person or on Zoom. Each group will do practice presentation.

Due Tuesday April 23th

- Presentation Slide Deck
- Briefer

Week 17, April 23- May 3   Client Presentations & Final Deliverables

You will be presenting your final product to the client.

May 6	Feedback and Peer Review

Due Monday May 6th

- Final deliverables to client and professor
- Survey: Self and Peer Reflection #3

Supplementary Instructional Materials & Resources

Bardach, E., & Patashnik, E. M. (2017). *A practical guide for policy analysis: The eightfold path to more effective problem solving* (5th ed). Washington, D. C.: Congressional Quarterly Press.

Block, P. (2011). *Flawless consulting: A guide to getting your expertise used* (3rd ed.) Austin: Learning Concepts.

Eglene, O. (2000). *Conducting best and current practices research: A starter kit*. Albany, NY: Center for Technology in Government.

Frederickson, H. G. (1991). Toward a theory of the public for public administration. *Administration & Society*, *22*(4), 395-423.

Gawthrop, L. C. (2005). Public administration in a global mode: With sympathy and compassion. *Public Integrity*, *7*(3), 241-259.

Hammer, D., & Wildavsky, A. (1993). The semi-structured interview: An (almost) operational guide. In A. Wildavsky*, Craftways: On the organization of scholarly work* (2nd ed.) (pp. 57-101). New Brunswick, NJ: Transaction Publishers.

Harvard Business School. (Oct., 2000). The Basic Presentation Checklist. *Harvard Management Communication Letter*, *3*(10), 4-5.

Kolb, J. A. (2014). Conflict management principles for groups and teams. *Industrial and Commercial Training*, *45*(2), 79-86.

Marton, B. (2000, April) How to construct a winning presentation, *Harvard Management Communication Letter*, *3*(4), 4-5.

Moore, T. (1991). A practical guide for managing planning projects. *Journal of the American Planning Association*, 57(2), 212-222.

Musso, J., Biller, R., & Myrtle, R. (2000). Tradecraft: Professional writing as problem solving. *Journal of Policy Analysis and Management*, *19*(4), 635-646.

O'Leary, Zina. (2017). The Essential Guide to Doing Your Research Project, 3rd edition. SAGE.

Schwartz, T. & McCarthy, C. (2007, Oct.). Manage your energy, not your time, *Harvard Business Review*, *85*(10), 63-73.

William N. Dunn, *Public Policy Analysis: An Introduction*, Fourth Edition

David McNabb, Research Methods in Public Administration and Nonprofit Management: Quantitative and Qualitative Approaches

Beth M. Schwartz, R. Eric Landrum, and Regan A. R. Gurung, An Easy Guide to APA Style, 2e

Catherine F. Smith, Writing Public Policy: A Practical Guide to Communicating in the Policy Process

Students and Disability Accommodations:

USC welcomes students with disabilities into all of the University's educational programs. The Office of Student Accessibility Services (OSAS) is responsible for the determination of appropriate accommodations for students who encounter disability-related barriers. Once a student has completed the OSAS process (registration, initial appointment, and submitted documentation) and accommodations are determined to be reasonable and appropriate, a Letter of Accommodation (LOA) will be available to generate for each course. The LOA must be given to each course instructor by the student and followed up with a discussion. This should be done as early in the semester as possible as accommodations are not retroactive. More information can be found at osas.usc.edu. You may contact OSAS at (213) 740-0776 or via email at osasfrontdesk@usc.edu.

Support Systems:

Counseling and Mental Health - *(213) 740-9355 – 24/7 on call*
Free and confidential mental health treatment for students, including short-term psychotherapy, group counseling, stress fitness workshops, and crisis intervention.

988 Suicide and Crisis Lifeline - *988 for both calls and text messages – 24/7 on call*
The 988 Suicide and Crisis Lifeline (formerly known as the National Suicide Prevention Lifeline) provides free and confidential emotional support to people in suicidal crisis or emotional distress 24 hours a day, 7 days a week, across the United States. The Lifeline is comprised of a national network of over 200 local crisis centers, combining custom local care and resources with national standards and best practices. The new, shorter phone number makes it easier for people to remember and access mental health crisis services (though the previous 1 (800) 273-8255 number will continue to function indefinitely) and represents a continued commitment to those in crisis.

Relationship and Sexual Violence Prevention Services (RSVP) - *(213) 740-9355(WELL) – 24/7 on call*
Free and confidential therapy services, workshops, and training for situations related to gender- and power-based harm (including sexual assault, intimate partner violence, and stalking).

Office for Equity, Equal Opportunity, and Title IX (EEO-TIX) - *(213) 740-5086*
Information about how to get help or help someone affected by harassment or discrimination, rights of protected classes, reporting options, and additional resources for students, faculty, staff, visitors, and applicants.

Reporting Incidents of Bias or Harassment - *(213) 740-5086 or (213) 821-8298*
Avenue to report incidents of bias, hate crimes, and microaggressions to the Office for Equity, Equal Opportunity, and Title for appropriate investigation, supportive measures, and response.

The Office of Student Accessibility Services (OSAS) - *(213) 740-0776*
OSAS ensures equal access for students with disabilities through providing academic accommodations and auxiliary aids in accordance with federal laws and university policy.

USC Campus Support and Intervention - *(213) 740-0411*
Assists students and families in resolving complex personal, financial, and academic issues adversely affecting their success as a student.

Diversity, Equity and Inclusion - *(213) 740-2101*
Information on events, programs and training, the Provost's Diversity and Inclusion Council, Diversity Liaisons for each academic school, chronology, participation, and various resources for students.

USC Emergency - *UPC: (213) 740-4321, HSC: (323) 442-1000 – 24/7 on call*
Emergency assistance and avenue to report a crime. Latest updates regarding safety, including ways in which instruction will be continued if an officially declared emergency makes travel to campus infeasible.

USC Department of Public Safety - *UPC: (213) 740-6000, HSC: (323) 442-1200 – 24/7 on call*
Non-emergency assistance or information.

Office of the Ombuds - *(213) 821-9556 (UPC) / (323-442-0382 (HSC)*
A safe and confidential place to share your USC-related issues with a University Ombuds who will work with you to explore options or paths to manage your concern.

Occupational Therapy Faculty Practice - *(323) 442-2850 or* otfp@med.usc.edu
Confidential Lifestyle Redesign services for USC students to support health promoting habits and routines that enhance quality of life and academic performance.

Analytical Report on the San Diego Expansion of KIPP SoCal Public Schools

Prepared by: Michael Schumer, Jared Barnett, Chelsea Guevara, & Nadia Watts
USC Price School of Public Policy, University of Southern California
Prepared for: KIPP SoCal Public Schools

RESEARCH METHODOLOGY

MJCN Advisors utilized an assortment of data to answer the research questions including:

- Peer-reviewed research
- Census information on ZIP Codes: 92114, 92113, 92102, 92105, 92154
- Case studies
- Achievement rates
- Open source research

The scope and methods used to analyze the data included:

- KIPP SoCal's Greenlighting Framework
- Grade Configurations
- Environmental Justice Analysis
- Feasibility Analysis
- Comparative Analysis
- Charter Management Organizations Review

ISSUE STATEMENT

To bridge the achievement gap amongst Southern California (CA) children from disadvantaged, low-income communities and increase their impact, KIPP is embarking on an exploratory journey of adding an additional school in San Diego, CA. To support this, MJCN Advisors performed a comprehensive analysis focusing on two fundamental research questions:

- **Is it feasible, or mission-aligned, for KIPP SoCal Public Schools to open a new charter school in San Diego, CA?**
- **If so, which charter school grade configuration (either TK–4 or TK–8) should KIPP SoCal Public Schools open?**

GRADE CONFIGURATIONS

This section provides the rationale behind the grade configuration recommendation. Essentially, MJCN Advisors deduced that increased funding from CA into transitional kindergarten (TK) programs and concerns regarding quality of transitional education in grade school configurations of TK–8 and TK–12, provided enough support for a TK–4 grade configuration in San Diego.

ENVIRONMENTAL JUSTICE (EJ) ANALYSIS

An EJ perspective affords a broader, more holistic understanding of possible school sites. KIPP can benefit from considering the unique environmental context for students and the social determinants of health. The state's lead air quality agency, the California Air Resources Board (CARB), indicates the San Diego neighborhoods face exposure to toxic air pollutants. CARB's geospatial software tools indicate that Barrio Logan faces disproportionate air pollution—this negatively affects education and youth development. Barrio Logan is also home to cultural touchstones like Chicano art murals, so this built and natural environment is critical to consider. Clean-up days and EJ activism are two ways to blend advocacy, youth development, and comprehensive education for young people. KIPP can work with environmental justice advocates to build the new school. EJ stakeholders have political and social capital to advocate for the new school. KIPP could work with the San Diego Air Pollution Control District to offer air monitors as a way to reduce the air pollution burden at schools. Overall, this EJ Analysis is a vital tool in this school exploration process.
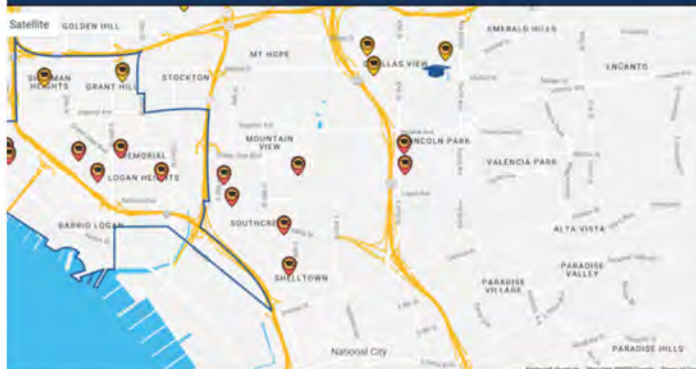

Note. California Climate Investments Priority Populations 2022 CES 4.0 Map of Barrio Logan

FEASIBILITY ANALYSIS

KIPP's Greenlighting Framework was used to explore Mission Alignment of proposed sites:

- Site 1: 92113 ZIP Code, Barrio Logan (BL) & Logan Heights (LH)
- Site 2: 92102 ZIP Code, Sherman Heights (SH) & Grant Hill (GH)

Note. Created by MJCN Advisors in 2023 to showcase proposed site distances from KIPP Adelante

Community Survey 2021 data and open source research was used to score benchmarks per the framework.

Market Analysis

Free & Reduced Meals
Using California Department of Education's (CDE) Income Eligibility Scales for the 2021–2022 school year, household incomes in the proposed sites were analyzed to determine free or reduced meal eligibility. Approximately 86.4% of households in Site 1 and 67.7% of households in Site 2 would qualify for either free or reduced meals and snacks.

Student Demographics
The following pie charts report that a majority of children in Sites 1 and 2 are considered Black, Indigenous, and People of Color (BIPOC) as well as those identifying as Hispanic or Latino.

Site 1 (BL/LH)

White: 67.60%
Black/African American: 7.40%
American Indian/Alaska Native: 0.40%
Asian: 1.80%
Native Hawaiian/Other Pacific Islander: 0.10%
Some other race: 3.80%
Hispanic/Latino: 85.10%

Site 2 (SH/GH)
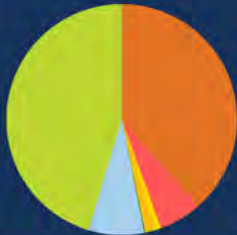
White: 63.10%
Black/African American: 9.60%
American Indian/Alaska Native: 1.40%
Asian: 2.20%
Native Hawaiian/Other Pacific Islander: 0.30%
Some other race: 12.70%
Hispanic/Latino: 74.10%

Note. Created by MJCN Advisors in 2023 from 2021 ACS data

College Completion Rates

The % of adults with a Bachelor's Degree or higher in Sites 1 and 2 are:

- Site 1 (BL/LH): 12.8%
- Site 2 (SH/GH): 39%

Neighborhood Viability

A list of elementary schools within Sites 1 and 2 had enrollment rates for 2021→2022 and enrollment statuses reviewed. Data showed that enrollment rates between the years dipped and children in Sites 1 and 2 either need increased access to education or they will soon need access to early education, like TK.

Long-Term Growth Output

BL and LH of Site 1 will be growing exponentially due to a newly approved growth blueprint and increased federal/state funding while SH and GH of Site 2 had less distinctive findings with only verbal promises from a city leader.

Need

School Performance

MJCN Advisors reviewed score percentages of the California Assessment of Student Performance and Progress (CAASPP) System tests where standards were either met or exceeded in English, Mathematics, and Science for the elementary schools within Sites 1 and 2 as well as Adelante, who constantly ranked higher.

Feeder School Accessibility

Sites 1 and 2 can create a feeder pattern to Adelante. It was found that an additional KIPP presence would create a linear transition for KIPP TK–4 students and a split pathway for the already existing feeder in the area, Logan Memorial.

Underperforming Seats

MJCN Advisors reviewed score percentages of the CAASPP System tests where standards were not met in English Language Arts, Mathematics, and Science for the elementary schools within Sites 1 and 2—almost all schools have more than 15% of students in underperforming seats.

Capital Improvement Program Plans

SDUSD CIP does not mention new construction within Sites 1 and 2, so it appears that KIPP could move forward in building or leasing within these locations.

COMPARATIVE ANALYSIS

The Comparative Analysis was used to compare Sites 1 and 2. Four additional factors were considered when comparing locations. The factors include:

- Relative locations to KIPP Adelante
- Average monthly income
- Additional demographics
- Neighborhood data
- Housing data

These factors must be considered when selecting a place for the new campus. They all, in different ways, play into KIPP's primary goal of providing education to children in low-income households, Additionally, having a diverse population within their new campus is vital.

Through research, it was identified that the new TK-4 location in either Site 1 or 2 would be close enough to Adelante to allow transitions and commutes between schools to be manageable for families.

Data also showed that Site 1 has more children who are living below the poverty line when looking at household income.
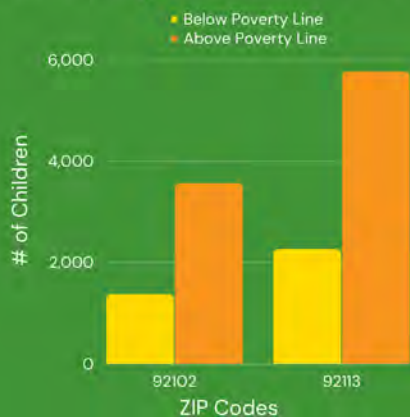
Note. Created by MJCN Advisors in 2023 from 2021 ACS data

Additionally, Site 1 has more Hispanic and Latinos, so a KIPP school is this area would yield a more diverse campus.

Lastly, neighborhood and housing data collected included total number of households and percentage of children under 18 within Sites 1 and 2.

With all variables presented and considered throughout the report, the site that would better house a new KIPP charter school would be Site 1.

CHARTER MANAGEMENT ORGANIZATIONS (CMOS) REVIEW

This review provides additional insight into the addition of a TK-4 KIPP school in San Diego. Each CMO had a different approach to expanding their reach that KIPP should consider in their San Diego expansion. Some key takeaways included beneficial information to expand KIPP's framework. The largest takeaway in this section is that network expansion encompasses more than simply finding a locations and opening schools in desired areas—expansion must be intentional and thoughtful. This approach requires a CMO to take risks, break barriers, and engage with their communities, or stakeholders, in meaningful ways. Because KIPP has had such great success with their programs, they have shown that their model works, so expanding their reach in other parts of San Diego will benefit for both KIPP and the community.

The following includes the list of CMOs analyzed:
- Achievement First
- Aspire Public Schools
- IDEA Public Schools
- Noble Schools
- Rocketship Public Schools
- Success Academy Charter School

RECOMMENDATIONS

1. KIPP SoCal Public Schools should open a **TK-4 charter school** in San Diego, CA
2. The location of the new KIPP charter school should be in Site 1, the **92113 ZIP Code** of San Diego, specifically within the Barrio Logan and Logan Heights communities