

UNIVERSITY OF WISCONSIN—MILWAUKEE
School of Architecture and Urban Planning
Department of Urban Planning

Applied Planning Workshop: UP 811

Spring 2020

Tuesdays, 5:30 – 8:10 PM Room 183

Instructors:

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Office hours: After class or by appointment

This course provides students with an opportunity to apply the planning skills and knowledge they have developed through the MUP program, as well as work-related experience. The course is a semester-long planning problem in which students work in small groups, taking a client-centered approach to defining and solving the planning problem. Each group will act as a consulting team with a real world client. Depending on the nature of the client, assignment, and work scope, groups may approach their projects at different levels of analysis (site, neighborhood, or multi-neighborhood area), and different foci (housing, access to services, job development, sustainability, or master planning).

Students will be accountable for defining the planning problem in ways that meet the needs and interests of the client. For example, if the client says that the three main issues are crime, poverty, and substance abuse, a group cannot decide to focus on the problem of stormwater runoff and land use, unless the group persuades the client that this problem is more important or significantly related to the problems the client identified.

Each group will be responsible for producing a final report of professional quality. Based on your recommendations and final deliverables, the client may later choose to undertake additional analysis or take your recommendations into implementation.

Objectives

1. Develop project management skills. APW involves longer and more complex planning problems than in PPA, requiring the coordination of individual and group efforts over a longer period of time.
2. Learn to critically assess the essential planning challenges while engaged in the planning process. Through critical assessment of the planning process, learn to make adjustments and adaptations to meet problems that arise.

3. Further develop professional communication skills. A variety of communication skills will be required: interviewing skills in discussing the problem, objectives, and alternatives with the client, stakeholders, and focus groups; writing, editing, and proofreading skills in producing the narrative of the final report; graphical skills in producing graphics to illustrate the final report; and presentation skills to present the final report to the community.
4. Develop interpersonal and group management skills, including leadership (and "team-building") skills and conflict resolution skills.
5. Produce a professional quality product that can be presented to future employers as evidence of your planning experience and level of skill.
6. Use skills commonly used by professional planners.

Detailed Class Syllabus

The semester's work is depicted in the following chart. Each week will show the date of class, the class activity, and the work products due during your meeting with the instructors.

Most of class time will be spent discussing or reviewing project work. A few classes also include skill development lectures.

We ask for drafts of any work product at least one week before it is due in final form. The purpose is twofold - this allows the work product to be reviewed prior to formal submission and gives the teams a chance to correct any deficiencies before the work products are turned in for grading.

Often draft products of one assignment are due on the same day as final products of another assignment.

Assignment Requirements

Draft work products must be typed, except for alternatives that may be graphics or social media elements. Draft assignments are not graded.

Final work products must be typed and will be graded. **Final work products should be uploaded to the Canvas dropbox as well as turned in at class time.**

Workload (total hours per student is approximately 180 hours; contributing additional hours beyond the minimum expectation will yield a better final project)

40 percent	Class and Team meetings
40 percent	Research, including meeting with client and public meetings
10 percent	Writing and editing presentation, report, assignments, etc.
10 percent	Preparing images and illustrations for the report and layout

You are required to keep track of your "billable hours" each week. Billable hours are the hours you spend working on class assignments. Follow the format below.

Logs are your record of billable hours for each week. Provide them to your project manager once a week. Each project manager should give a summary to the instructors as noted in the syllabus, not weekly.

TEAM MEMBER LOGS:

Format for logs of "billable hours" from each team member to your project manager.

Student Name at top of sheet

Date	# of Hours	Task Description
Date	4	gathering base maps
Date	6	gathering demographic data
Date	2	team meeting

PROJECT MANAGER SUMMARY OF TEAM WORK:

Format for Summary of Logs (these are summaries for each team member, not detailed dates for each team member) We do not want all of the detail from each member, just the total for the period covered and a brief list of the main things each person worked on.

Project Name at the top of the page

Person	Total # of Hours per person	Variety of tasks they worked on.
Joe	34	data research, base maps
Mary	25	questionnaire draft
Steve	30	case study research, site visit

Project managers should add up the hours received from each individual team member and provide a total for that time period, per team member. We do not need to see every day for every team member.

Class Session	Activity	Products Due
<p>January 21</p>	<p>COURSE INTRODUCTION</p> <p>Introduction of projects by instructors.</p> <p>Instructors discuss expectations for group organizational plan, draft problem statement and data needs.</p> <p>Groups will be assigned to projects.</p>	<p>None</p>
<p>January 28</p>	<p>Introduction of projects by the Clients</p> <p>Clients present Projects</p>	<p>Logs to Proj. Man.</p>
<p>February 4</p>	<p>Lecture INTRODUCTION TO PROJECT MANAGEMENT; MEANINGFUL PUBLIC INVOLVEMENT</p> <p>DEFINING THE PROBLEM Students share what they have learned about each project through their visits, meetings with the client and other stakeholders, and other data collection.</p> <p>Faculty meet with groups during the class period and provide expectations for the Scope of Work.</p>	<p>Logs to Proj. Man.</p> <p>Draft Group Organizational Plan</p> <p>Draft Problem Statement</p> <p>Data Needs</p>

<p>February 11</p>	<p>Faculty meet with groups during the class period.</p> <p>Instructors provide expectations for the Objectives and Criteria.</p>	<p>Logs to Proj. Man. Summary Log to Instructors</p> <p>Final Problem Statement</p> <p>Final Data Needs</p> <p>Draft Scope of Work</p>
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<p>February 18</p>	<p>Faculty meet with groups during the class period.</p>	<p>Logs to Proj. Man.</p> <p>Final Group Organizational Plan</p> <p>Draft Goals, Objectives, and Criteria</p>
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<p>February 25</p> <p>Clients Attend</p>	<p>FORMAL PRESENTATIONS BY EACH GROUP – PROJECT OVERVIEW, FINAL PROBLEM STATEMENT, AND SCOPE OF WORK</p> <p>Client sign-off on Problem Statement and Work Plan</p>	<p>Logs to Proj. Man.</p> <p>Final Scope of Work Prints for Client & Faculty</p>
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<p>March 3</p>	<p>PUBLIC INPUT WITH PROJECT STAKEHOLDERS (target date, actual date may be different)</p> <p>Faculty meet with groups during the class period.</p> <p><i>Agreement between instructors and team on the deliverables that require specific, detailed alternatives.</i></p> <p>Draft Synopsis of Public Input (DUE one week after focus group meeting)</p>	<p>Logs to Proj. Man. Summary Log to Instructors</p> <p>Public Input agenda and presentation</p> <p>Final Goals, Objectives, and Criteria</p>
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March 10	Faculty meet with groups during class.	Report Outline Draft Alternatives Peer Evaluations Logs to Proj. Man. Summary Log to Instructors
March 17	Spring Break	
March 31	Lecture WRITING AND FORMATTING THE REPORT: InDesign and Proofreading Faculty meet with groups during class.	Logs to Proj. Man. Draft Analysis and Recommendations Final Alternatives
April 7	Faculty meet with groups during class. Draft text to faculty if you want written feedback.	Logs to Proj. Man.
April 14	Faculty meet with groups during class. Draft text to faculty if you want written feedback.	Logs to Proj. Man.
April 21	Faculty meet with groups during class.	Logs to Proj. Man. Summary Log to Instructors
April 28	Draft Presentation to instructors (Last day of APA National Conference in Houston.)	
May 5	FINAL PRESENTATIONS:	Logs to Proj. Man.

May 12th – NO CLASS Final Reports, Summary Logs, and Peer Evaluation due in Carolyn's mailbox by 3:00 PM

Recommended readings:

Recommended Project Management Readings :

"Project Management JumpStart," Kim Heldman, PMP, Harbor Light Press.

Recommended Public Input Readings :

"Conducting Successful Focus Groups: How to Get the Information You Need to Make Smart Decisions," Judith Simon, Amherst H. Wilder Foundation. Available from the APA Bookstore.

Evaluation and Grading

Grades will be based on the following assessments. Students will be graded individually for the course, grades on group products are a strong component of individual grades. Individual grades are given for client presentations, role within the team, role on the final report, Log of Billable Hours, and Peer Evaluations.

Graded Products	<u>Max Points</u>	<u>% of Grade</u>
Problem Statement	50	5%
Scope of Work	50	5%
Goals, Objectives, and Criteria	50	5%
Public Input Presentation	100	10%
Alternatives	150	15%
Presentation (group grade)	50	5%
Presentation (individual grade)	100	10%
Analysis	200	20%
Individual Contribution*	--	
Final Reports	<u>250</u>	<u>25%</u>
	1,000	100%

* Individual Contribution to final product, including Logs & Peer Evaluations
Instructors have the discretion to adjust grades to recognize the degree of contribution that we learn from peer evaluations and our observations.

In addition to the descriptions below of the graded and ungraded written work, please use the grading rubrics posted to Canvas as a guide to understanding expectations for each assignment.

WRITTEN ASSIGNMENTS

Group Organizational Plan (not graded, email in addition to hard copy)

Project group prepares a plan (strategy) for how the project team will be organized and what role each member will have. Each member should be primarily responsible for managing one element of the project, with one member also selected as the Project Manager. Project managers are responsible for collecting team logs, submitting summary logs to instructors, overall team management, and may be the client contact. Excel format recommended.

The group organizational plan should include a brief description of the team's agreements relating to coordination, accountability, and quality control. This description should briefly clarify norms of communication and decision-making when disagreements and friction arise.

Data Needs (not graded)

Prepare a list of items the group needs from the Client to complete the project. The list should include the items and when they are needed. For example: base map information (3rd week of class), census information (3rd week of class), list of focus group members (4th week of class), etc. Format can be either Word or Excel.

Group Problem Statement

The Problem Statement describes the problem that the planning process will address. The Statement is the charge to the planning team, will direct your Scope of Work, and sets the direction for the semester. The Statement should be concise yet provide a clear sense of the scope and focus of the planning effort. It should include the problem to be solved with your project and the overarching goal in solving it.

Each group turns in only one statement. This will be the final statement of the problem that will guide the group's work. Although some minor changes can be made after this point, this statement needs to be firm so that the group's work moves in a consistent direction.

Presentation

The Presentation requires a Powerpoint file (or similar) and a group oral presentation to your client and classmates during class time on the due date. The Presentation will include your most current version of the Problem Statement, an overview of the context as you understand it at this time, findings to date, and a summary of the scope and deliverables that you are proposing to the client.

Scope of Work

Using the principles and practices described in the lecture and discussions with your Client and instructors. Develop a work plan for completion of the project, including a description of all draft and final products (deliverables). Hard copy of Scope and Deliverables to faculty and client.

Public Input Agenda, Presentation, and Summary

Prepare an agenda, presentation, role of team members, and list of invited members. After the Public Input, prepare a meeting summary to highlight the critical issues and viewpoints expressed. *Summary due one week after the public input is completed.*

Goals, Objectives, and Assessment Criteria

Goals and objectives are a standard part of every planning process. They guide your work during the development of the plan and focus your selection of alternatives and recommendations.

Goal – overarching statement of intent to guide decisions.

Objective – more specific intent/objective statement to guide decisions and activities.

For this assignment, you need to articulate clear goals and objectives. You can have one set of goals and objectives for the entire project or different objectives for each deliverable.

You need to describe **how you will assess** (decide) the strengths and weaknesses of your proposed solutions in terms of the goals and objectives. That is, how will you assess how well your proposed solutions achieve the client's goals **for each of your deliverables**. Your analysis of information and client goals will allow you to determine the actions that are most likely to achieve the goals.

Report Outline (not graded)

Outline of all report sections and subsections, sample report format (InDesign required), and outline of Appendix items.

Alternatives

Some planning documents describe multiple alternatives, analyze all of the alternatives, and recommend one alternative (PPA approach). Some deliverables are not easily approached in this way (design guidelines, marketing plans, financing options, etc.)

Because this course is a learning process, you are required to "show your work" in terms of the alternatives that are considered for those deliverables for which alternative approaches should be considered. Instructors will clarify with teams the deliverables that need specific alternatives presented in detail for this assignment. For each deliverable for which alternatives are required, the instructors want to see that you have considered a range of different approaches to meet the goals of the project. Each deliverable for which alternatives are required, the team should present at least two options. Alternatives should:

- Represent a range of different approaches to meet the objectives
- Respond to the problem and goals, though clearly some alternatives will do better than others.

The written form of these alternatives may be a detailed list of deliverables, drawings of alternative design approaches, media, etc.

For those deliverables for which specific alternatives are not required, the team should present successive drafts of deliverables (e.g., brochures, marketing materials, implementation tools, etc.) at weekly meetings. The final version of your alternatives for each deliverable should be included in the final report, as appropriate, previous alternatives or versions can be in the Appendix as needed.

Final Presentation

This should be a professional quality presentation. Members of the community, clients, and other stakeholders will be invited. In addition to the group grade for the final report, individual performance will be graded as well.

Analysis, Recommendations, and Implementation Strategy (graded in final report but recorded as a separate grade; client feedback will be an element in the grading)

The analysis for each deliverable should discuss how well each alternative achieves the objectives, as well as any problems related to feasibility and unintended consequences. The analysis should be based on a thorough and accurate investigation of the problem, the community context, and the likely performance of alternatives in addressing the problem.

Following the analysis, recommend an implementation strategy including responsible parties, priorities, and phasing for each deliverable.

Final Report (InDesign format required; client feedback will be an element in grading)
The final report should be a complete planning report, professional in appearance, written in a clear and concise style that will be understood by the client and community stakeholders. In addition to the sections of the report which have been assigned above (and which have been revised and refined based on feedback from faculty), the final report should include recommendations for action and any appropriate maps, drawings, photos, and appendices. The final report should be visually interesting. Most importantly, the final report should provide a useful “roadmap” for the client in undertaking action to address the problem identified in the problem statement.

Submittal requirements for the Final Report:

To DUP and instructors

- Due in Carolyn's mailbox, one printed copy for the department
- **Upload** the following to an online folder that will be announced later this semester: pdf of the final report, InDesign file of the final report, and Appendices in original format (Word, Excel, etc.). You should have uploaded the final presentation previously, on the date that the presentation was due.

To Client – students are responsible to provide to your Client

- One printed copy of the report
- A digital copy for the Client – including a PDF of the final report and specific deliverables. Teams may decide to include additional files related to deliverables that will be useful to the client. **Consult with your client how the the digital copy should be delivered (CD, flash drive, cloud folder, etc.)**

Logs of Billable Hours (individual logs due weekly to team Project Manager)

This assignment is intended to mimic time spent on a project that you might encounter while working for a private consulting firm. The faculty's expectation is that each student will spend 12 hours each week working on the project, including time spent in class, in group meetings (while the group is being productive), and working individually. Include the time spent in group coordination and management. Use the log format included in the syllabus. Round to the nearest quarter of an hour, and show partial hours as decimals of an hour, e.g., 0.25, 1.5, 2.75.

Students may elect to work fewer hours in one week and make up that time in the following week. Students are responsible for working a minimum of 180 hours over the course of the semester and to maintain accurate logs of their activities. Logs should be shared with the group members prior to each submission of the team log and prior to peer evaluations. The team should discuss any discrepancies or weaknesses identified in the hours reported. **The team is welcome to discuss problems with work performance in team meetings with the faculty.**

Peer Evaluation

Twice during the semester, each member of your group will evaluate the performance of every other member of the group. A copy of the form is attached to the syllabus and can also be downloaded from Canvas.

During each evaluation, each team member will have a total of 100 points to distribute among the members of the group, DO NOT include yourself as part of the point distribution, but include your name on the evaluation form. The average peer evaluation scores and comments will be used by the faculty to adjust individual grades up or down from the group project grade. Two ballots are provided in the syllabus, one for each evaluation.

The Peer Evaluations are confidential. Peer evaluations are the opportunity to provide comments that support your score for each team member. Both are considered seriously by the faculty in assigning individual grades at the end of the semester. The faculty will take special note when evaluations by peers corroborate the faculty members' own observations of individual student contributions.

Communication with Faculty

When communicating with the faculty by e-mail, **please send your message to all faculty members**, rather than sending messages to just one of us.

SPECIAL ACCOMMODATION

Students with limitations due to disability, including learning disability may request for any reasonable accommodations. Students will be allowed to complete examinations or other requirements that are missed because of a religious observance. In case of special accommodations are needed in order to meet any of the requirements of this course, please contact me as soon as possible.

ACADEMIC CONDUCT

The University, as an instrument of learning, is predicated on the existence of an environment of integrity. Faculty have the primary responsibility for establishing and maintaining an atmosphere and attitude of academic integrity such that the enterprise may flourish in an open and honest way. Students share this responsibility for maintaining standards of academic performance and classroom behavior conducive to the learning process. Please review Chapter UWS 14 and Faculty Document No. 1686 at: http://www4.uwm.edu/acad_aff/policy/academicmisconduct.cfm for both UWM's and our expectations of appropriate student academic conduct.

Original Work and Plagiarism: All work in this course should be your own. In written work, cite your sources for quotes, facts, and opinions, both in the body of your work and in the bibliography. Do not copy word for word unless you place the words in quotation marks. Any plagiarism will be dealt with as a serious ethical breach. If you have questions about whether you are crossing an ethical line, ASK ME. Here is a link to some good information on plagiarism: <https://usingsources.fas.harvard.edu/>

Other Course Policies: This course adheres to campus policies regarding students with disabilities, religious observances, active military service, incompletes, discriminatory conduct, academic misconduct, complaints about the course, grade appeals, and firearms. For details about these policies, see http://www4.uwm.edu/secu/news_events/upload/Syllabus-Links.pdf

PEER EVALUATION FORM, APW (form can be downloaded from Canvas)

You may submit this information by email (not using this form) as long as you include all of the required information.

List your name here _____

List Group Members and assign points (do not include yourself in the list)

Merit Points

_____	_____
_____	_____
_____	_____

TOTAL POINTS _____ (must equal 100)

Comments and Rationale (Do not include comments about yourself)

Group Member Name _____

Group Member Name _____

Group Member Name _____