

USP 533: PLANNING METHODS I
Fall Quarter 2006

Tues/Thurs 4:40 – 6:30 pm
Urban Center 270

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Office Hours: Urban Center 370-E
Wednesdays 4:00-6:00pm
Tuesdays by appointment

COURSE DESCRIPTION & OBJECTIVES

The work of planners involves data, people and analysis. We have to define problems, ask the right questions, collect and process information, develop alternative solutions, and provide a well grounded basis for decision making. There is rarely one right way to analyze an issue or one correct outcome of an analysis. An effective planner is inquisitive, is willing to try new methods of collecting information, and explores a variety of problem definitions and alternatives. This work involves more than just data collection and number crunching. Planning at its core requires strong inter-personal skills to ensure relevancy, to gain support, and to provide all perspectives an opportunity to be part of the process. Such skills include one-on-one communication along with the ability to work as a team member and with public groups. Finally, a planner must know how to effectively communicate the results of his/her work so that decision makers and the public at large understand the issues and can make sound decisions.

This course will introduce you to a variety of analytical skills and techniques used in the planning profession. We will start with the basic analysis process, including data collection and transformation, problem definition, evaluation criteria, and alternatives analysis highlighting relevant quantitative and qualitative methods. You will then gain hands-on experience developing survey instruments and conducting oral interviews, and learn the data and methods needed for land use planning in contrast to planning analysis. We will also spend time developing effective written and oral presentation techniques.

By the end of the course, you will be able to:

- Define a planning problem appropriately;
- Know what information is necessary to answer planning questions, how it needs to be analyzed, and where/how to obtain the information;
- Develop and analyze a range of alternative responses to a problem;
- Communicate the results of an analysis in an appropriate format for the intended audience; and
- Appreciate small group dynamics and working with real world clients and deadlines.

READINGS

There are three textbooks for the course, available at the PSU Bookstore. Other readings will be handed out in class or available on-line.

Patton, Carl V. and David S. Sawicki (1993) *Basic Methods of Policy Analysis and Planning*. 2nd edition, Prentice Hall: Englewood Cliffs, NJ. ISBN: 0-130-60948-X. (“PS” in the syllabus)

Emerson, Robert M., Fretz, Rachel I., and Linda L. Shaw (1995) *Writing Ethnographic Fieldnotes*. University of Chicago Press, Chicago. ISBN: 0-226-20681-5. (“EFS” in the syllabus)

Salant, Priscilla. and Don A. Dillman (1994) *How to Conduct Your Own Survey*. Wiley Press, New York. ISBN: 0-471-01273-4. (“SD” in the syllabus)

ASSIGNMENTS & GRADING

Weekly in-class activities	20% (total)
Class presentations	10% (total)
Assign. #1: Data analysis	5%
Assign. #2: Neighborhood Observation	10%
Assign. #3: Land Use Inventory	10%
Assign. #4: Interview	10%
Assign. #5: Survey	15%
Assign. #6: Policy Analysis	20%

Assignments and activities are briefly described below. Note that **more detailed directions will be posted on the web site and discussed in class**; the descriptions below are simply intended to give you a sense of what you can expect to be doing over the quarter. Unless otherwise noted, assignments must be turned in (hard copy, not electronic) at the beginning of class on the date due.

Weekly In-Class Activities

This class relies on active participation from students. You will be expected to participate in a variety of in-class exercises and discussions. Most of the exercises are skill-based, and will be needed to complete future assignments. While you can certainly make up the exercises if you miss class (and I would highly encourage you to do so), no points will be given to these late assignments; you must actually be in class to get credit for any in-class activity. There will also be one or two times during the quarter when I assign a particular topic that will be discussed in class. These discussions will usually be based on the readings for that day, and cannot be made up for obvious reasons (e.g., you can't have a "discussion" by yourself). In-class activities are worth 20% of your total grade.

Two Class Presentations

At two points during the quarter, you will be expected to present your assignment findings to the class. For assignments 1, 2, 5 & 6 (only) there will be 15 to 30 class presentations, depending on the assignment and size of the class. A sign up sheet will be made available on the second day of class so that you know in advance which assignments you'll be responsible for presenting. Each student will sign up for one presentation of assignments 1 or 2 and one presentation of assignments 5 or 6. Presentations are to be no more than 5 minutes long, followed by 2 minutes for comments, so you'll need to be organized, prepared and succinct. Each presentation is worth 5% of your total grade.

Assign. #1: Data Analysis

Objective: Appreciate the strengths and limitations of secondary data; use and display quantitative data to explain a problem or issue.

Task: You will be randomly assigned a specific planning problem/issue. You are to identify three types of census data that could be used in analyzing this problem. You will download the data into an Excel spreadsheet, develop one table and one figure, along with a short text discussing the data and findings. (An in-class demonstration will be given on the Tuesday of Week 2 to guide you through the steps in downloading, analyzing and presenting census data.) The table, figure and text should all be organized onto one page. Be sure that your table and figure are labeled. Then, using no more than one *additional* page, evaluate this data with respect to the six questions on pages 110-111 of PS.

Due: Maximum 2 pages, single-spaced, including table and diagrams, due at the start of class on October 5. Worth 5% of your total grade.

Assign. #2: Neighborhood Observation

Objective: Collect and record useful information via direct observation.

Task: You will walk a portion of the target neighborhood, starting from an assigned point. Take detailed notes on what you observe, following the writings of Emerson, Fretz and Shaw. What can you observe that's not available from other – more traditional – sources? Focus on both the people and the physical environment. After observing and documenting the neighborhood, write a summary description and interpretation of what you saw.

Due: Maximum 3 pages, single-spaced, not including photos, diagrams or other visual aids, due at the start of class on October 17. Worth 10% of your total grade.

Assign. #3: Land Use Inventory

Objective: Conduct, report, and interpret a traditional land use inventory. Work effectively as a team.

Task: Working in small groups, you will conduct a land use inventory of a selected area within the target neighborhood. The work will also include developing a measure of conditions such as the quality of sidewalks, presence of street trees, building quality, lighting, litter, etc. The final product will include a land use map, appropriate documentation of your measure, and a brief report highlighting your findings.

Due: Maximum 3 pages, single-spaced, not including the map, due at the start of class on November 16. Worth 10% of your total grade.

Assign. #4: Interview

Objective: Gain skills and confidence in conducting one-on-one interviews. Understand how individual perspectives can enlighten the planning process.

Task: You are expected to find and interview one person on a pre-defined topic (to be announced in class on October 12). On October 12 we will also spend time developing your interview methodologies and practicing interviews with your classmates. Your final interview will be recorded on a regular size cassette tape and handed in with a 2-page summary of your interview. Your report on the interview is not a transcript. It should do the following:

- provide a name, title and contact information for the person you interviewed
- discuss your interview goals, and how your strategy was adjusted once it began
- summarize the knowledge gained from your interview
- discuss what you learned that surprised you (or what happened that you didn't anticipate)
- discuss the relevancy of what you learned to planning

Due: Maximum 2 pages, single-spaced, plus a properly labeled cassette tape (with recorded interview), due by the start of class on October 24. Worth 10% of your total grade.

Assign. #5: Survey

Objective: Develop & pretest survey instrument for use in understanding issues in target neighborhood.

Task: In small groups, you will define relevant information that can be obtained through a self-administered survey and organize your questions into a clear format, using no more than 2 pages. Using feedback from a pre-test of the survey instrument, you will revise the survey. You will also prepare a brief methodology for conducting the surveys, along with any additional necessary materials.

Due: Printer-ready survey instrument and supplementary materials, plus 1-page survey methodology, due at start of class on November 14. Worth 15% of your total grade.

Assign. #6: Policy Analysis Paper

Objective: Conduct a planning analysis within a limited timeframe and with limited data.

Task: Select a planning problem within the target neighborhood that has been identified during the quarter (possible issues will be brainstormed in class on October 24 and you should finalize your topic no later than October 31). Following the basic methods of policy analysis presented in Patton and Sawicki, you will generate recommendations for responding to this issue. You will also need to document the identified planning problem using *relevant* quantitative and qualitative data. You will be graded on the content, presentation, and persuasiveness of your report. (By persuasiveness, I mean: did you convince me that (1) there is a problem, and (2) your recommendation is be viable and effective?).

Due: Maximum 6 pages, single-spaced, plus a cover memo/executive summary (not included in the 6 pages), due at start of class November 28. Worth 20% of your total grade.

COURSE WEBSITE

There is a WebCT web site for the course. You must have an ODIN account to access WebCT. WebCT course sites can be accessed at *webct.pdx.edu*. If you're registered for the class and have an ODIN account, you'll be added to the course web site automatically.

I will rely on the web site extensively for announcements, updates, and additional information.

Course Content: Lecture materials, additional information and references, and assignments.

Calendar: Important deadlines and other events.

Grading: WebCT has a place for the instructor to record grades, where a student may view his/her grades to date.

WebCT Mail: This mail system only works within this course web site. It is not automatically linked to your normal email or to other WebCT course sites. Unless you set it to forward to your personal email account, you must read mail within WebCT.

WebCT software provides the instructor with the ability to track students' use of the site, including how many messages the student posts, how many messages the student has read, and which content pages the student has viewed.

OTHER STUFF

If you have a disability and are in need of academic accommodations, please notify me immediately to arrange needed supports.

Plagiarism and cheating will not be tolerated. (Tip: if you're wondering if it's plagiarism or cheating, it probably is; if you have questions, please come see me.)

Late assignments will be marked down 5% per day (including weekends) until it's turned in.

TENTATIVE SCHEDULE

Date	Topic	Reading	Assignments Due
9/26	Introduction to Course Value of Qualitative & Quantitative Data		
9/28	Defining the Planning Problem Methods of Policy Analysis (vs Planning)	PS 2, 4	
10/3	Policy Analysis Case Study Working with (& Presenting) Census Data	PS 12 Website	Excel 101 (optional, ungraded exercise)
10/5	Presentations (15): Data Analysis	None	Data Analysis
10/10	Observing and Interpreting a Place Recording Your Observations	EFS 1-3	
10/12	Individuals as Sources of Information Interviewing Techniques	EFS 5 Website	
10/17	Presentations: Neigh. Observation	None	Neigh. Observation
10/19	Presentations: Neigh. Observation	None	
10/24	Conducting & Analyzing Land Use Surveys Brainstorming: Policy Analysis Topics	Website	Interview
10/26	Interview Assessments Establishing Evaluation Criteria	PS 5	
10/31	Identifying & Evaluating Alternatives	PS 6, 7	
11/2	How (& When) to Conduct Surveys Working with Individual-level Data	SD 2-4	LU Inventory
11/7	Developing the Survey Questionnaire Getting Survey Responses	SD 5-8	
11/9	Community-Based Workshops	Website	
11/14	Coding and Entering Survey Data Working with (& Presenting) Qualitative Data	EFS 6 SD 9, 10	Pre-tested surveys
11/16	Presentations: Surveys	None	Final survey
11/21	Population Projections Additional Sources of Information	Website	
11/23	<i>No class tonight. Happy Thanksgiving.</i>		
11/28	Presentations: Policy analysis	None	
11/30	Presentations: Policy analysis <i>Final Exam Review Sheet Distributed</i>	None	
Exam week	No final: Survey stuffing & Potluck		Policy analysis papers