URBPLAN 721: Applied Planning Methods Syllabus

Fall 2020—3.0 Credits
Scheduled for Monday, 1:30 to 4:10 p.m
Via Canvas; “live streaming” session schedule as below.

**Course Instructor:** Virginia Carlson, Ph.D., MUPP (vcarlson@uwm.edu); Carlson.virginia@gmail.com
**Office:** AUP 223

**Carlson “Office” Hours and availability:** I will open a room on Canvas Collaborate Ultra on Mondays from 10:00 to 12:00, and you can find me there. Otherwise, feel free to text me for another slot if you need to speak. I will be available Saturdays, Sundays, Mondays. I am unreachable during the day to talk on Tuesdays-Fridays. But TEXT. TEXT works best and if you need a communication relatively quickly, and it can be used to set a time to talk. If you email me, expect an answer in 36 hours.
Phone 414.708.4398 (text OK and preferred). TEXT, please.
Availability: Sunday-Monday
I cannot stress enough that if you need to get hold of me Tuesday-Friday, you won’t get an answer immediately if you email me. If you have a long question, email me but then text me that you sent an email.

**Course Teaching Assistant:** Isabel Gunderson
Gunderson “Office” Hours and availability
On Canvas Collaborate Ultra Wednesdays from 2:30 – 4:30
Email: gunder75@uwm.edu

**Goal**
To create passion about the nature of epistemology and the practice of data gathering, and thus inherent biases in the data you’ll use; and to enable you to use data persuasively, with integrity and with knowledge of its limitations.

**Course Background**
As a professional planner, you will be an important participant in decision-making processes. Decisions are often complicated and controversial. While many factors, including political considerations, contribute to these decisions, including political forces, data are almost always part of the argument. As a planner, people will look to you to understand, collect, analyze, and present data that can help inform decisions. Especially in our current era of “alternative facts” you’ll be challenged on your choice of data, or even if data matters.

This graduate-level course will help you learn about data and methods that are used in the planning field, to use them correctly and logically in a professional context, and present them in a persuasive manner. The course will not only cover the data and methods themselves, but will also focus on technical expertise in data exploration and visualization (primarily through Excel); professional writing standards; and the logic of arguments and persuasive speech and writing. The class will emphasize communication and persuasion.

You are entering a professional field that uses public data at the beginning global revolution in data development and privacy concerns. The dimensions of the revolution and implications for the field of planning and policy will be a theme running through this course.
Texts, Readings

Required

- **Storytelling with Data: A Data Visualization Guide for Business Professionals.** By Cole Nussbaumer Knaflic, 2015
- **How to Conduct Your Own Survey.** By Priscilla Salant and Don Dillman. John Wiley, 1994, 1st edition
  (This book is somewhat data and does not include internet-based methods, but it is the best book for beginners; information on internet methods will be added through other readings.)
- Excel tutorials: [https://www.contextures.com/](https://www.contextures.com/)
- Supplemental readings as announced and available on the Canvas site or internet links.

Recommended

- Student writing will be expected to adhere to the Chicago writing and grammar style given by these guides:
  3. **Web site for writing quick guide**
     - You may also need to refresh your knowledge of logic and common fallacies found in writing and argumentation. Assignments will sometimes ask you to make an argument – be sure you’re aware of common logical mistakes. My favorite book for this is **Asking the Right Questions: A Guide to Critical Thinking** by M. Neil Browne and Stuart M. Keeley. Various editions are available from your Favorite Online Retailer or local bookstore. I like the 9th edition best.
     - Finally, we will work with data using Excel and this course assumes you know the basics of summing, counting, and creating basic formulas including how to anchor a cell. Excel tutorials abound on YouTube. This might do for you if you need it: [https://www.youtube.com/watch?v=rwbho0CgEAE](https://www.youtube.com/watch?v=rwbho0CgEAE)
     - A guide to simple planning terms and concepts, the basics of planning practice, etc: [http://plannersweb.com](http://plannersweb.com)

Conduct and Ethics

Much of this class is about gathering data. Cite your sources. If you get information from a printed, online, video or another source, cite it. If you cite a reference word for word, put those words in quotes. Even if from an internet article. Don’t use someone else’s work as if it was your own without citing it. Citing sources, even if it takes extra time, enhances your professional credibility.

Students are expected to follow the Guide for Students at [http://uwm.edu/deanofstudents/conduct/conduct_procedures/academic-misconduct/](http://uwm.edu/deanofstudents/conduct/conduct_procedures/academic-misconduct/)
Please closely review the definition of plagiarism. According to this source, “Plagiarism includes: 1) Directly quoting the words of others without using quotation marks or indented format to identify them; or, 2) Using sources of information (published or unpublished) without identifying them; or, 3) Paraphrasing materials or ideas of others without identifying the sources.” This includes material from the internet. Directions for correctly citing work may be included in assignments; otherwise

Plagiarism is a serious infraction. Any work that includes plagiarized material will be given a failing grade (sanction “B” in the flowchart linked below). NO EXCEPTIONS. I encourage you to review this flowchart. https://uwm.edu/academicaffairs/wp-content/uploads/sites/32/2015/02/misconduct_flowchart.pdf

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, firearms, social distancing, and mask wearing. For details about these policies, see https://uwm.edu/secu/syllabus-links and click on “syllabus links.” Alternative address for the pdf version: PDF of Syllabus Links

Campus COVID Policies
Remember to follow basic “pandemic sensitive” policies and behaviors. The entire campus-wide policy is available at https://uwm.edu/secu/syllabus-links/ and click on “COVID-19 Syllabus Statements.” The most important for us are the following:

- Six-foot social distancing must always be maintained if on campus.
- Masks are always required on campus, with limited exceptions—environments where hazards exist that create a greater risk by wearing a mask (for example, when operating equipment in a lab with the risk of a mask strap getting caught in machinery, or when flammable materials are being used).
- Our class sessions will be audio-visually recorded for students who are unable to attend at the scheduled time. Students who participate with their camera engaged or who utilize a profile image are agreeing to have their audio/video or image recorded. Likewise, students who un-mute during class and participate orally are agreeing to have their voices recorded.
- Notify me in advance of the absence or inability to participate, if possible.

Your health is of primary importance

- Participate in class activities online and submit assignments electronically, to the extent possible.
- Reach out to me if illness will require late submission or other modifications to deadlines.
- If remaining in a class and fulfilling the necessary requirements becomes impossible due to illness or other COVID-related circumstances, contact me to discuss other options.

Assignments
The course assignments are designed to help you practice understanding, collecting, analyzing, and presenting planning-related data. Your assignments should be written to a professional standard and writing quality will be considered in your grades. Communicating your ideas clearly and effectively through writing is essential for your career, so it is important for this class. http://plannersweb.com/2014/10/important-skills-planning-staff/

Some weeks I’ve presented you with a lot of written material. Assignments are generally designed to help you work through that material with attention given to “what counts? What should I pay attention to?” – so that you can focus on what the most important takeaways are.
Grading
The class has five modules and assignments are given for each module.

- The first is an introduction to data. Why we need data for planning, policy and public administration. How the “data landscape” has changed with the advent of the internet and data technology in terms of data availability, data stewardship, and good analysis.
- Second is a section on data manipulation and good presentation
- Third is a section on gathering primary data, including surveys and field research. What can you do to ensure quality primary data? Also, knowing how surveys are done will help you be critical about the information you consume.
- Fourth is a section on secondary data—data gathered by someone else. Some of these sources have historically been very standard for planning and policymaking, others not used as often.
- Fifth deals with techniques specific to planning and policy.

Points are earned with the following components:

1. **Class participation (10).** (Ongoing). Each student starts with 10 points in their class participation grade. One point is deducted for every unexcused class absence (please notify your TA as soon as you know a conflict/emergency has arisen and in order to garner an excused absence).
2. **On the Nature of Data. (15).** 3-page essay (single-spaced, one line between paragraphs, 12-point or lower font, standard margins) on the “promises and pitfalls” of various kinds of data available to the public and private sector.
3. **Decluttering presentation (10).** You will be given data and an example of a “bad” visual or two using that data; and will be asked to manipulate the data and present it more meaningfully.
4. **Survey Design (15).** Design and a fielded questionnaire.
5. **Statistical System Worksheet (5).** There are lots of moving parts to the Federal Statistical System, which is the main source of demographic data used by planners. This assignment is formulated to guide your reading, aka, “what is most important” because of the large number of pages assigned for the day.
6. **Demographic Profile (15).** As we discover demographic data sources, you’ll be expected to use these sources to build a story about a Milwaukee neighborhood.
7. **Economic Profile (15).** A basic analysis of an economy using standard methods.
8. **Final (15).** Not comprehensive. Will consist of questions on Benefit/Cost and Retail Markets.

A special note on writing. Part of the grade for most assignments will be for the written portion. Please pay attention to tone, style, understandability, organization, etc. Use the recommended resources given above for online and off-line help; also take advantage of the UWM Writing Center. Specific criteria will be given with each assignment.

Total points will correspond with the following letter grades:

- 94 and above = A
- 91 to 93.9 = A-
- 88 to 90.9 = B+
- 83 to 87.9 = B
- 81 to 82.9 = B-
- 78 to 80.9 = C+
- 73 to 77.9 = C
- (and so on)
Module I – Introduction to Data

Class 1. September 14 – The Role of Quantitative Information in Planning
Do citizens trust numbers?

Readings

Assigned: On the Nature of Data

Class 2. September 21 – What’s Data and how do we get it?
What is data (“epistemology” thereof), how do we collect it, and what are the implications for accuracy and coverage?

Readings
2.5 https://www.fastcompany.com/90310803/here-are-the-data-brokers-quietly-buying-and-selling-your-personal-information

Due Draft: On the Nature of Data. Each student will be required to discuss their initial thoughts in this class

Module II – Data Manipulation and Presentation

Class 3. September 28 – Data Manipulation and Presentation I
Work offline
Readings
3.1. Nussbamer, chapters: all
3.2. Pivot Tables in Excel: https://www.contextures.com/CreatePivotTable.html

Due: *On the Nature of Data*
Assigned: *Decluttering presentations*

**Class 4. October 5 – Data Manipulation and Presentation II**
Students will present examples of decluttering presentations

**Readings**
4.1. **Nussbamer**, chapters: all
4.2. Pivot Tables in Excel: [https://www.contextures.com/CreatePivotTable.html](https://www.contextures.com/CreatePivotTable.html)

Due: *Decluttering presentation*
Assigned: *Survey Design*

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**Module III – Primary Data Collection**

**Class 5. October 12 - Dimensions of Designed Primary Data Collection**
Where we focus on designing and implementing surveys

Administrative vs. Survey Data
Sampling concepts (target population, sample frame, probability sampling, response rate, biases)
Classifications, NOIR
Statistics basics (sample size, confidence level)

**Readings**
5.2. Salant and Dillman, Chapters 1 - 5 (skim 4)
5.3. Robert Niles’ website for data journalists, especially these two links:

**Class 6. October 19 - Designing Survey Questions and Answers**
Work offline with group critiques, TBD

**Readings**
6.1. Salant and Dillman, Chapter 6

Due: *Survey Design*
Module IV – Secondary Data

Class 7. October 26 - Introduction to Statistical System Concepts
Work Offline on “Statistical System Worksheet”

History of
Scope of data collection
Geographies
Same data, different sources
Citizens?

Readings
7.3. Margo Anderson interview on the Decennial Census citizenship question: https://www.npr.org/2018/05/17/612082682/lawmakers-prepare-to-question-justice-department-on-census-citizenship-question
7.4 Introduction to Census Geographies

Due: Statistical System Worksheet

Class 8. November 2 – Demographic Data: Census and American Community Survey
Introduction to Data.Census.gov
Race and other classifications

Readings
8.2. Data.census.gov Directions – Canvas Handout

Assigned: Neighborhood Demographic Profile

Class 9. November 9 - Demographic Data: Analyzing Income and Work

Work
Job vs. Employment
Commuting, Place of Work vs. Place of Residence: On the Map
Presenting Jobs and Income data (indexing)

Readings
9.2. http://www.bls.gov/cps/cps_htgm.htm (Skim links to understand where unemployment data come from, according to the BLS, and more on the definition of unemployed.)


- NAICS
- Location Quotient
- Shift Share

Readings:
10.2. https://www.census.gov/programs-surveys/economic-census/about/faq.html (Choose the top couple of links to get a sense of what the Economic Census is.)
10.3. https://www.bls.gov/web/empsit/cesprog.htm (Choose the top couple of links to get a sense of what the Current Establishment Survey is.)
10.5. Source unknown. Shift Share Analysis.
10.6. Virginia Carlson lecture on economic base.

Due: Demographic Profile
Assigned: Economic Profile

Module V – Financial Techniques

Class 11. November 23 – Values over Time

- Adjusting for inflation
- Discounting/Present Value
- Seasonal Adjustment

Readings:

Class 12. - November 30 - Benefit/Cost Analysis

Readings:
12.1. Excerpt from: Bendavid-Val, chapter 17
https://www.fastcompany.com/3046345/how-copenhagen-became-a-cycling-paradise-by-
Due: Economic Profile

Class 13. – December 7 - Retail Trade Areas
Economic Census
Note: there are more “sophisticated” ways of performing market analysis with existing GIS tools, but here I take you back to basics.

Readings
13.2. Arthur O’Sullivan. Essentials of Urban Economics. Chapter 4: Market Areas and the New Urban Hierarchy. (Skim to get a sense of the geographic scale at which different retail and service sectors work.)

14. – December 14 – Study Day
We’ll have a summary class or an open hours session unless we need this day to make up previous undone classes (e.g., we had a “snow day” or a flood).

Final Exam (15 points) Due Monday December 21st at 1:30