URBPLAN 721: Applied Planning Methods Syllabus

Fall 2021—3.0 Credits
Scheduled for Monday, 5:30 to 8:10 p.m., 9/13-12/14
Hybrid online/offline class sessions; 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 am available via email, text and periodically in person. The best way is to text me to set up a meeting, or to let me know that you’d like to chat or talk, or to set up a meeting for a day when I will be in town. TEXT. TEXT works best.
Phone 414.708.4398 (text OK and preferred).
Availability: As needed

Course Teaching Assistant:
Grace Gent
Availability: By appointment
Email: gegent@uwm.edu

Goal
To create passion about the nature and practice of data gathering and analysis for decision-making. Create healthy skepticism regarding data integrity and limitations. Develop skills related to data acquisition, analysis and presentation.

Course Background
Data and analysis are an important participant in planning decision-making processes. 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.

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 (including writing) and persuasion.

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

Texts, Readings
Required
(This book is somewhat dated and does not include internet-based methods, but it is the best low-cost book for beginners and is still in print; information on internet methods will be added through other readings.)
• **Counting: How We Use Numbers to Decide What Matters.** By Deborah Stone. Liveright Publishing Corporation, 2020 1st edition. (This book is aimed at a somewhat younger audience, but it introduces concepts clearly and there are many relevant chapters.)

• **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. My assessment of your writing will be based on the following sources.

   Online link to some of the material [https://www.chicagomanualofstyle.org/home.html](https://www.chicagomanualofstyle.org/home.html) - both the “Teachers” link and the “Student” link are helpful; especially see [https://www.chicagomanualofstyle.org/book/ed17/frontmatter/toc.html](https://www.chicagomanualofstyle.org/book/ed17/frontmatter/toc.html) (section on grammar and usage)


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**

Most 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 and avoids plagiarism.

Students are expected to follow the conduct prescribed in the Guide for Students at [https://uwm.edu/deanofstudents/academic-misconduct/](https://uwm.edu/deanofstudents/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.

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 which
visually depicts the process by which suspected plagiarism will be investigated. In short, if plagiarism is suspected, my first step will be to speak with the SARUP investigating officer, and then you.


Other Course Policies
Campus 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, resources for students, COVID19 protocols, and other public concerns. For details about these policies, see https://uwm.edu/secu/syllabus-links and click on “syllabus links.”

Campus COVID Policies

Remember to follow basic “COVID-19 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,” reproduced here in full.

COVID-19 SYLLABUS STATEMENTS, FALL 2021

1. Panther Community Health and Safety Standards

   UWM has implemented reasonable health and safety protocols, taking into account recommendations by local, state and national public health authorities, in response to the COVID-19 pandemic. As a member of our campus community you are expected to abide by the Panther Interim COVID-Related Health & Safety Rules. These standards apply to anyone who is physically present on campus, in UWM-controlled facilities, or participating in a UWM-sponsored activity.

2. With respect to indoors spaces on UWM facilities (classrooms, labs, performance spaces, etc.):

   • Masks are always required while indoors on UWM campuses and in UWM-controlled facilities, 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). Exceptions must be approved in advance.

   • A student who comes to class without wearing a mask will be asked to put on a mask or to leave to get one at a mask handout station. Failure to do so could result in student discipline.

   • You should check daily for COVID symptoms by completing the self-check at https://uwm.edu/coronavirus/symptom-monitor/. Symptoms may appear 2-14 days after exposure to the virus and include fever, cough, or shortness of breath or difficulty breathing. See the CDC’s Website for more information about COVID-19 symptoms.

   • If you test positive for or are diagnosed with COVID-10 based on symptoms, you should complete this Dean of Students Office form: https://cm.maxient.com/reportingform.php?UnivofWisconsinMilwaukee&layout_id=4. By doing so, you will get information on resources, help UWM identify individuals you may have come into contact with on campus so that UWM can work with the local health department, and allow UWM to clean campus areas you visited as appropriate.
3. **Attendance Policy**

Do not attend your in-person class if you have COVID-19, if you are experiencing symptoms consistent with COVID-19, if you have been in close contact with others who have symptoms, if you need to care for an individual with COVID-19 or have other health concerns related to COVID-19.

- You should be aware of each of your course’s attendance policies. In case of illness, you should contact your TA immediately to discuss options for completing course work while ill.
- Notify me or the TA in advance of the absence or inability to participate, if possible.
- 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, contact me to discuss other options.

As your instructor, I will trust your word when you say you are ill, and in turn, I expect that you will report the reason for your absences truthfully.

4. **Class Content**

**Synchronous Online Class Recording**

Our online 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.

5. **Potential for Reversion to Fully Online Instruction**

Changing public health circumstances for COVID-19 may cause UWM to move to fully online instruction at some point during the semester. UWM will communicate with students about moving to fully online instruction if the situation develops.

6. **Navigate Student Success Platform and Mobile App**

Students are encouraged to use a tool called Navigate. This tool can help you learn about academic resources, set up study groups in your courses, make appointments with your academic advisor, get reminders on important dates, and much more. In addition, Navigate allows instructors to send Progress Reports to students throughout the term, allowing for updates on your academic progress in a course in addition to your grade. You can log into the platform here: https://uwmilwaukee.campus.eab.com/ or by finding the Navigate link under the Current Students tab on the UWM home page. More information on how you can use Navigate and the app, including tutorials, can be found on UWM’s Navigate website.
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. Proof!: http://plannersweb.com/2014/10/important-skills-planning-staff/

Grading
Grade are awarded for assignments that correspond to class topics.

Points are earned with the following components:

1. Introduction to Data (10)
2. Data Visualization with Excel (10)
3. Survey Design (20). Design and field a survey (group project); will consist of several parts.
4. Statistical System Quiz (5)
5. Neighborhood Profile (20). Census data on a Milwaukee neighborhood
7. Values over time (5)

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 may be given with each assignment, and I may ask you to re-write an 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)
Course Schedule

Assigned books appear in bold. All other readings available on Canvas or via direct URL

Module I – Introduction to Data

Class 1. September 13 – Quantitative Information in Planning
What kind of data, why, and from where?


1.3. Statistical programs of the United States Government 2018 https://www.whitehouse.gov/wp-content/uploads/2018/05/statistical-programs-2018.pdf (focus on pages 1-23). SCAN this for an overview of what kind of data the Federal Statistical System collects. (Even though there is a version available for 2019/2020, this 2018 version is better organized for our purposes.) Pay attention to what data are collected via survey methods and which are considered administrative records.


Assigned: Introduction to Data

Class 2. September 20 – Basics of counting and Operationalization
What is data (operationalization of fuzzy concepts and classifications), how do we collect it, and what are the implications for accuracy and coverage?
Operationalizing standard concepts (poverty, employment, etc).


2.2. Counting, Prologue and chapters 1-4.


Assigned: Basics of Data Manipulation and Visualization
Due Tomorrow September 21 9:00 pm Introduction to Data
Module II – Primary Data Collection

Class 4 IN PERSON. October 4 – Surveys I
Where we focus on designing and implementing surveys
Sampling concepts (target population, sample frame, probability sampling, response rate, biases)

4.1. Salant and Dillman, Chapters 1 – 5
4.2. Dillman and Smith chapter 3
4.3. Robert Niles’ website for data journalists, especially these two links:
   http://www.robertniles.com/stats/margin.shtml
   http://www.robertniles.com/stats/dataanly.shtml

Due Tomorrow October 5th 9:00 pm: Draft of Sampling and Fielding Process for Survey

Class 5. October 11 – Surveys II: Designing Survey Questions and Answers

5.1. Salant and Dillman, Chapters 6, 7
5.2. Scott Smith and Sarah Fisher. “How to write great survey questions (and avoid common mistakes).“
5.3. Counting, chapter 5

Due Tomorrow October 12th 9:00 pm: Draft of Survey Questions – Instructor return by EOD October 13

Class 6. October 18 – Surveys III: Fielding Surveys

6.1. Salant and Dillman, Chapter 8
Module IV – Secondary Data

**Class 7. October 25 – Introduction to the Census, ACS, Statistical System Concepts**


7.2. Census Geography [https://www.census.gov/programs-surveys/acs/geography-acs/concepts-definitions.html](https://www.census.gov/programs-surveys/acs/geography-acs/concepts-definitions.html)

7.3. Introduction to Data. Census.gov [https://www.youtube.com/watch?v=xBrimZ_vdqM](https://www.youtube.com/watch?v=xBrimZ_vdqM)

*Assigned: Statistical System Quiz*

*Due Today October 25th 5:30 pm: Survey Project Final*

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**Class 8 IN PERSON. November 1 – Demographic data**

Race, Citizenship, Households, and other classifications

Guest Speaker Margo Anderson

8.1. Race. [https://www.census.gov/topics/population/race/about.html](https://www.census.gov/topics/population/race/about.html)

8.2. *Counting*, pages 67-72, also chapter 5 again. 10.1.

8.3. Households vs. Families. [https://www.prb.org/resources/whats-a-household-whats-a-family/](https://www.prb.org/resources/whats-a-household-whats-a-family/)


*Due Tomorrow November 2nd 9:00 pm: Statistical System Quiz*

*Assigned: Neighborhood Profile*

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**Class 9. November 8 – Demographic Data: Income and Work**

Work

Job vs. Employment

Commuting, Place of Work vs. Place of Residence: On the Map


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

9.3. [https://lehd.ces.census.gov/applications/help/onthemap.html#what_is_onthemap](https://lehd.ces.census.gov/applications/help/onthemap.html#what_is_onthemap)

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**Class 10. November 15 - Economic Data**

NAICS review

10.1. [https://www.census.gov/programs-surveys/economic-census/about/faq.html](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.)

10.2. [https://www.bls.gov/web/empst/cesprog.htm](https://www.bls.gov/web/empst/cesprog.htm) (Choose the top couple of links to get a sense of...
what the Current Establishment Survey is.)

**Assigned: Economic Analysis**

**Due: **Today, November 15th 5:30 Neighborhood Profile

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**Class 11. November 22 IN PERSON –Analyzing Economic Data: Shift Share and Location Quotient**

Location Quotient

Shift Share


11.3. Virginia Carlson -- lecture on economic base.


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**Module V – Project Analyses**

**Class 12. November 29– Values over Time**

Adjusting for inflation

Discounting/Present Value

Seasonal Adjustment


12.3. [https://www.accountingformanagement.org/present-value-of-an-annuity/](https://www.accountingformanagement.org/present-value-of-an-annuity/)

**Due: **Today, November 29th 5:30 Economic Analysis

**Assigned: Values over Time**

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**Class 13. – Dec 6 - Benefit/Cost Analysis**

13.1. Excerpt from: Bendavid-Val, chapter 17


**Due: **Today December 6th 5:30 Values over Time
Class 14. — December 13 - Retail Trade Areas

Note: there are more “sophisticated” ways of performing market analysis with existing GIS tools, but here I take you back to basics.

14.2. 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.)


Final Exam (15 points, not comprehensive) Due Monday December 20th at 9:00 pm