Syllabus USP 533 Planning Methods I (Fall 2018)

Professor Megan Horst

We meet: Tuesdays and Thursday, 2pm-3:50pm, Karl Miller Center 185

Note this is a brief overview of class. I heavily use D2L, so please visit the D2L site for class policies and much more details about schedule, assignments, etc.!

The work of planners involves people, data, and data analysis. We have to define problems, ask the right questions, collect and process information, develop alternative solutions, and provide a well-grounded rationale for decision-making. Fortunately (or unfortunately) there is rarely one way to analyze an issue; likewise, there is rarely if ever one correct outcome of an analysis. An effective planner is inquisitive, willing to work with community members and leadership to identify and define problems, interested in trying new methods of collecting information, and able to explore and critique policy alternatives. This work involves more than just data collection and number crunching (and in fact, many times we do not have access to sufficient quantitative data). Planning at its core requires strong inter-personal skills which ensure relevancy, gain support and provide persons of all walks of life/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 issue and can make sound decisions.

This course is intended to introduce you to fundamental primary (and generally though not exclusively field-based and qualitative) research methods and techniques used in planning practice. We begin by considering the special nature of planning problems as “wicked” problems that can be formulated in multiple ways. The awareness of multiple frames for defining controversial issues is kept in mind as we develop primary data collection instruments and consider analysis from many angles. You will gain hands-on experience in some of the key skills of fieldwork and collecting and analyzing qualitative data, including observations and interviewing. You will also be given an opportunity practice teamwork skills and to hone your professional writing and oral presentations kills.

We will work in close collaboration with a client on a real-life planning issue, in so-called "applied planning research." By the end of the quarter, you will have a planning report for your portfolio.

Course learning objectives:

1. Apply the planning research process, starting with defining the problem/opportunity/goal and analyzing existing conditions, with a client.
2. Develop a good interview plan and guide, implement interviews, and analyze interview data
3. Design a survey that minimizes survey error and asks good survey questions
4. Prioritize equity in research, by understanding inequities as rooted in systemic oppression and by applying an equity lens.
5. Reflect on bias, validity and reliability challenges as related to qualitative methods, and identify ways to overcome those challenges, such as triangulation.
6. Employ "best" practice research (better called interesting idea research) and strategy sessions to make planning recommendations.
7. Document and reflect on your researcher positionality and initiate a practice of reflective planning and critical reflexivity.
8. Develop positive strategies for effective teamwork, including articulating your own roles in promoting inclusivity and anti-oppression in teamwork.

**Topic and Client**

Each year, we have a different topic and client. I try to identify issues that intersect deeply with questions of social justice and ecological sustainability, and that expose you to a "wicked" problem in planning in Portland and/or Oregon.

Recent past focuses have included:

- Fall 2017: Southwest In Motion, Portland Bureau of Transportation
- Fall 2016: Agritourism and its positive and negative impacts on commercial farming, for the Department of Land Conservation and Development
- Fall 2015: Public space improvements for diverse populations along the proposed Powell Bus Rapid Transit Route, City of Portland

This year's client is:

- Portland Fire and Rescue
- Our main task: Complete research for the Blueprint for Success model for 4 station areas. More info forthcoming.
- Our main contact: Robyn Burek (she/her) | Principal Management Analyst **Voice**: 503.823.3749 | **Mobile**: 971.291.7404 | **Email**: robyn.burek@portlandoregon.gov

**Weekly Topics Overview- See Modules for more info**

- Week 1: Introduction & First Client Meeting (We will meet our client on Thursday Sep 27 at Fire Station 1 in Old Town)
- Week 2: Existing Conditions & Teamwork (Thursday Oct 4- Robyn and Justin visit us in class to talk data)
- Week 3: Researcher Positionality & Observations (Thursday Oct 11- we might use classtime for station visits; stay tuned)
- Week 4: Interviews
- Week 5: Ethics & Equity in Planning Methods (Plus Client Check-ins on Thursday Oct 25)
• Week 6: Strategies/Recommendations
• Week 7: Survey Sampling, Design & Questions (Also brief Team Check-In with Dr. Horst)
• Week 8: Analyzing Qualitative Data & Monitoring/Evaluation
• Week 9: Communication Tips (Tuesday Nov 20: Client Check-in; No class on Thanksgiving)
• Week 10: Practice Presentations & Strategy Sessions (Strategy sessions may be scheduled on Thursday Nov 29 at your stations; stay tuned)
• Week 11: Client Presentations at Monday, December 3rd, 10:15am-12:05pm. In our classroom. Final deliverables due by end of week.

Assignment & Grades

This class has a lot of moving parts! See D2l Dropboxes for specific instructions/guidance on each assignment.

Individual Assignments (40%):

• Not graded: Draft of Section 1
• 10% Positionality Essay*
• 20% Your part of Section 1: Existing Conditions Analysis
• 10% Reflexivity Surveys- one midway and one at end*

Team Assignments (60%):

• Not graded: Drafts of Sections 2-4
• 10% Team Basics*: Team Contract & Team Station Visit & FMA Observations
• 20% Client Presentation (team grade)
• 30% Client Report, Sections 2--4 (not including Section 1: Existing Conditions section, which will be evaluated separately)- note that team members typically receive the same grade, though I reserve the right to adjust individual scores up or down based on individual effort/quality work.

For each major assignment, I will use a rubric to guide my evaluation. See the rubric associated with the assignment. I attempt to get feedback grades back within ONE week of the due date (But I am human, so sometimes it takes a bit longer).

At the end of the quarter, your grade out of 100% will be converted to a letter grade using the below scale:
Due Dates Schedule

Again, See relevant dropboxes or calendar for specifics. I reserve the right to modify this schedule slightly as needed.

- End of Week 2: Team Contracts due
- End of Week 3: Individual Positionality Essay
- End of Week 4: Team Station Visit & Observations due, and Draft Team Interview Plan and Guide due
- Week 5/Tuesday: Individual Draft Section 1: Data and Analysis Section due
- Week 5/Thursday: Team Check-ins with Robyn and Roy (to review Section 1 drafts)
- End of Week 5: Initial Individual Teamwork and Reflexivity Survey due
- End of Week 8: Team Draft Sections 2 & 4 (3 not due yet)
- Week 9/Tuesday: Team Check-ins with Robyn and Robyn (to review Sections 2 and 4 drafts and talk about station strategy sessions)
- Week 10 in class: Team Practice Presentations and Station Strategy Sessions (some of these may be scheduled outside of class)
- Exam Week in class, Monday December 3rd 10:15am-12:15pm: Final Presentation to Client
- End of Exam Week: Final Client Reports Due (all 4 sections), plus Final Teamwork and Reflexivity Survey