

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

Applied Planning Workshop
Spring 2008
Tuesdays, 5:30 – 8:10 PM Room 191

Instructors:

Carolyn Esswein	cesswein@pdisite.com	414.271.2545
Nancy Frank	frankn@uwm.edu	414.229.5372

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. Students will 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, recreation, 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. Each group report will stand on its own as a completed project. 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, which require the coordination of individual 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 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 at the beginning of that class.

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

Typically, we ask for drafts of any work product at least two weeks before it is due in final form. The purpose is twofold. First, it is realistic in a planning profession to have work product reviewed prior to formal submission or publication. This allows another set of eyes to see the product, spot material omissions or oversights, and to edit for clarity. Second, it gives the teams a chance to correct any deficiencies before the work product are turned in for grading.

Often draft products of one assignment are due on the same day as final products of another assignment. Welcome to the multi-tasking world of projects.

You are also 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.

Assignment Requirements

Draft work products must be typed, but are not graded.

Final work products must be typed and will be graded.

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.

Format for logs of "billable hours"

Name at top of sheet

Date	# of Hours	Task Description

Format for Summary of Logs (provided by the Project Manager)

Project at the top of the page

Person	Total # of Hours	Variety of tasks they worked on.

Class Session	Activity	Products Due
<p>January 22</p>	<p>COURSE INTRODUCTION</p> <p>Introduction of projects by instructors.</p> <p>Groups will be assigned to projects.</p>	<p>None</p>
<p>January 29</p>	<p>Introduction of projects by the Clients</p> <p>Clients will present Projects</p> <p>Instructors will discuss expectations for group organizational plan, draft problem statement and data needs.</p> <p>5:30 – 6:00 Riverwest 6:00 – 6:30 Wauwatosa BID 6:30 – 7:00 Transit Riders Union 7:00 – 7:30 MMSD Master Plan 7:30 – 8:00 MMSD Public Participation</p>	<p>Logs to Proj. Man.</p>
<p>February 5</p>	<p><i>Lecture</i> INTRODUCTION TO PROJECT MANAGEMENT</p> <p>DEFINING THE PROBLEM Students will share what they have learned about each project through their visits, meetings with the client and other stakeholders, and other data collection.</p> <p>Instructors will 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>Draft Data Needs</p>

<p>February 12</p>	<p><i>Lecture</i> MEANINGFUL PUBLIC INVOLVEMENT: CHARRETTES, FOCUS GROUPS, INTERVIEWS.</p> <p>Faculty will meet with groups during the class period.</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>
<p>February 19</p>	<p>Faculty will meet with groups during the class period. Students shall present final Organizational Plan and Scope of Work.</p> <p>Instructors will provide expectations for client presentation.</p>	<p>Logs to Proj. Man.</p> <p>Final Group Organizational Plan</p>
<p>February 26</p> <p>Clients Present</p>	<p>FORMAL PRESENTATIONS BY EACH GROUP OF 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</p>
<p>March 4</p>	<p>FOCUS GROUPS WITH PROJECT STAKEHOLDERS (target date, actual date may be different)</p> <p>Instructors will provide expectations for Objectives and Criteria.</p>	<p>Logs to Proj. Man.</p> <p>Final Focus Group agenda and presentation</p> <p>Draft Synopsis of Focus Groups (DUE one week after focus group meeting)</p>
<p>March 11</p>	<p>Faculty will discuss expectations for peer reviews and generation of alternatives.</p>	<p>Logs to Proj. Man. Summary Log to Instructors</p> <p>Draft Objectives and Criteria</p>

March 18	Spring Break – No Class	
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March 25	Faculty will meet with groups during class. Review activity logs and fill out peer evaluations.	Peer Evaluation Forms Logs to Proj. Man. Draft Alternatives
April 1	Faculty will discuss expectations for project analysis and recommendations. Faculty will meet with groups during class.	Logs to Proj. Man. Summary Log to Instructors Final Objectives and Criteria
April 8	Each group will present their Preliminary Recommendations for discussion with faculty and peers	Logs to Proj. Man. Draft Analysis and Recommendations Final Alternatives
April 15	Faculty will meet with groups during class.	Logs to Proj. Man.
April 22	Draft presentation to the class.	Logs to Proj. Man.
April 29	APA Conference No class. Instructors available for help. Preparation for Final Presentations.	

May 6	FINAL PRESENTATIONS	Logs to Proj. Man. Summary Log to Instructors
May 13	<i>No class</i>	Final Reports Peer Evaluations

Recommended Project Management Readings :

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

Recommended Focus Group 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, though grades on group products will be a strong component of individual grades. Individual grades will also be given based upon the Log of Billable Hours and Peer Evaluations.

<u>Graded Products</u>	<u>Max Points</u>	<u>% of Grade</u>
Statement of Problem	50	5%
Scope of Work	50	5%
Objectives and Criteria	50	5%
Focus Group Presentation	100	10%
Alternatives	100	10%
Presentation	150	15%
Analysis	150	15%
Final Reports	250	25%
Logs & Peer Evaluations	<u>100</u>	<u>10%</u>
	1,000	100%

WRITTEN ASSIGNMENTS

Group Organizational Plan (not graded)

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. This will be a primary tool for the Project Manager.

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 set 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 goal for how to solve 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 inner changes can be made after this point, this statement needs to be firm so that the group's work moves in a consistent direction.

Scope of Work

Using the principles and practices described in the lecture and discussions with your Client, develop a work plan for completion of the project, including a description of all draft and final products (deliverables). Identify if you will be following Option 1 or Option 2 for class assignments.

Focus Group Agenda, Presentation, and Summary

Prepare an agenda, presentation, and list of invited members. After the Focus Group, prepare a meeting summary to highlight the critical issues and viewpoints expressed.

Objectives and Criteria

The statement of objectives should reflect the values and interests of the Client.

Option 1: Develop three objectives that establish the main priorities for the project. Objectives should address the issue identified in the Problem Statement. Criteria should be developed that will assess the degree to which each alternative meets each objective. (The objective is what you and the Client want to achieve, the criteria is how you measure if the objective has been met.) You can develop one set of criteria that is applied to each objective, or there can be different criteria applied to each objective.

Option 2: Develop three objectives that will help determine why multiple deliverables are needed. Objectives should address the variety of situations identified in the Problem Statement. Criteria should be developed that will assess the degree to which each product (alternative) meets the objectives. You can develop one set of criteria that is applied to each objective, or there can be different criteria applied to each objective.

Alternatives

Option 1: Each group should describe *at least* three distinct alternatives for addressing the problem. A "No Action" alternative will count as one of the three. Alternatives can build on one another so the first one is a minimal change for minimal cost, with the second and third alternatives adding to the first.

Option 2: Provide at least three different products for the Client to use. The products should respond to different needs determined during the Objectives and Criteria phase of the project.

Analysis and Recommendations

Option 1: The analysis should discuss how well each alternative achieves the objectives, as well as any problems related to feasibility or 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 and explain why you selected the preferred alternative. Provide an implementation strategy including responsible parties, priorities, and phasing.

Option 2: The analysis should discuss how the different products are meeting the objectives and criteria, how they will provide a long-term benefit for the Client.

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

Final Presentation

This should be a professional quality presentation. Members of the community, clients, and other stakeholders will be invited.

Final Report

The final report should be a complete planning report, professional looking in appearance, written in a clear and concise style that is 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 in light of 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:

- One CD for each instructor – PDF of final report
- One printed copy for the Client
- One printed copy for the Planning Department

Logs of Billable Hours (Due Weekly; Individual to your 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. But 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 may be shared with the group members prior to each peer evaluation.

Peer Evaluation

Twice during the semester, each member of your group will evaluate the performance of every other member of the group. Your group has a total of 100 points to distribute among the members of the group, INCLUDE YOURSELF as part of the point distribution. Faculty will find the average evaluation score for each member. 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 evaluations are anonymous, so students are encouraged to be honest in this process.

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.

Peer Evaluation Form, APW 2008

List Group Members (List your name also and then cross it out)

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 _____

Group Member Name _____

Peer Evaluation Form, APW 2008

List Group Members (List your name also and then cross it out)

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 _____

Group Member Name _____