# SI501: Contextual Inquiry & Consulting Foundations

## Syllabus for Winter 2021

### Instructors & Office Hours

<table>
<thead>
<tr>
<th>Role</th>
<th>Instructor Name</th>
<th>Contact Email</th>
<th>Office Hours (sign up at <a href="https://tinyurl.com/josias-officehours">link</a>):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty Instructor</td>
<td>Anthea Josias</td>
<td><a href="mailto:antheaj@umich.edu">antheaj@umich.edu</a></td>
<td>• Thursdays 9.30am -10.30am ET - <a href="https://umich.zoom.us/j/3145943058">link</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Fridays 9.30am - 10.30am ET - <a href="https://umich.zoom.us/j/3145943058">link</a></td>
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<td></td>
<td>• or check my umich calendar to set up an appointment if none of these times work for you</td>
</tr>
<tr>
<td>Graduate Student Instructor</td>
<td>Steven Cederquist</td>
<td><a href="mailto:cedsteve@umich.edu">cedsteve@umich.edu</a></td>
<td>Office Hours (sign up at <a href="http://bit.ly/3sjCXm6">link</a>):</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Thursdays 10am – 11am ET - <a href="https://umich.zoom.us/j/99400209293">link</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Thursdays 6pm – 7pm ET - <a href="https://umich.zoom.us/j/98780029698">link</a></td>
</tr>
</tbody>
</table>

### Class Meeting Times *(please note that you must be logged in with your UM credentials)*

<table>
<thead>
<tr>
<th>Type</th>
<th>Section</th>
<th>Time</th>
<th>Zoom link:</th>
<th>Assigned room:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecture (section 006 - ALL)</td>
<td>ALL</td>
<td>Mondays 6pm - 8pm ET</td>
<td><a href="https://umich.zoom.us/j/96766250205">link</a></td>
<td><strong>AUD 3 MLB</strong> **</td>
</tr>
<tr>
<td>Discussion (section 002)</td>
<td>002</td>
<td>Tuesdays 6pm – 7pm ET</td>
<td><a href="https://umich.zoom.us/j/97032650209">link</a></td>
<td><strong>2255 NQ</strong> **</td>
</tr>
<tr>
<td>Discussion (section 004)</td>
<td>004</td>
<td>Tuesdays 7pm - 8pm ET</td>
<td><a href="https://umich.zoom.us/j/94254210790">link</a></td>
<td><strong>2255 NQ</strong> **</td>
</tr>
</tbody>
</table>

** All Lectures and Discussions will be delivered on zoom. Room numbers above are shown for students who choose in-person interaction with (part of) their teams during Discussion and/or Lecture.
Course Description

This course builds two kinds of skills essential for modern knowledge work: (1) a qualitative research methodology based on contextual inquiry and human-centered design; and (2) foundations of professional consulting. Students will work in teams to investigate information use in specific real-world contexts and conduct field research (virtually) to inform the design of a workflow, process, app, product, service, or program. Along the way, students will gain experience in collaborative work; manage project timelines, workloads, and responsibilities; conduct interviews; observe work practices and information usage; synthesize qualitative data; and present their recommendations in both oral and written form.

Learning Objectives

Upon successful completion of this course, students will be equipped to do the following:

1. Collect, represent, and analyze qualitative data about a work process, product, or service, through contextual inquiry …
   a. Conducting semi-structured interviews;
   b. Processing interview notes into discrete pieces of qualitative data; and
   c. Analyzing qualitative data using affinity walls.

2. Apply foundational skills of good professional consulting by effectively…
   a. Working with a diverse team;
   b. Managing an external client-based relationship;
   c. Managing project timelines, responsibilities, processes, and work products;
   d. Generating, evaluating, and recommending specific recommendations to improve the effectiveness and efficiency of a work process, product, or service;
   e. Communicating findings and recommendations in oral and written form.

Course Structure

Because of the COVID-19 pandemic, this course will be taught in a hybrid mode that combines online instruction with optional in-person interaction. If you choose to be fully remote, you will be able to learn all of the material online. If you are interested in in-person interaction with an instructor, that will be possible; those who choose in-person interaction with teammates will have regular in-person interaction with other students. Asynchronous remote learning will also be possible for those who may be in faraway time zones, though this is discouraged.

Each student is expected to be enrolled in the Lecture (section 006) and one Discussion section (section 002 or 004). Within each Discussion section, students will be grouped into 3- to 5-person teams that work together for the entire semester. There will be no cross-section teams.

Lectures

Lecture will be held online and synchronously – i.e., live, in real-time – at the announced times. It is strongly suggested that you attend Lecture in real-time. For students who cannot attend synchronously, classes will be video-recorded for asynchronous viewing, and provisions will be made to complete in-class activities separately.
Discussion sections

Discussion sections will be held in a hybrid mode where students who wish to interact in person can do so in the allocated classroom (as indicated above). You are required to attend Discussion synchronously. (You should choose a Discussion section that allows this in your time zone.) There will be several meetings throughout the semester in which you will meet individually or as a team with the faculty instructor and/or your GSI. If both the instructor and you or your team prefer, these meetings will be held in person.

Project teams

Teams are expected to spend some time each week working together outside of class, and in some weeks, teams may spend much more time together (e.g., 8-10 hours). It is strongly suggested that you schedule 1- or 2-hour weekly meeting times with your teams early on for the rest of the semester. You can always cancel meetings if they are not needed.

The constraints of the pandemic force us to work virtually, often across time zones. Such work conditions are increasingly common in our globalized world, as some of you may already have experienced. We encourage you to use the opportunity to learn effective ways to work and communicate online – the better you adapt while in school, the better you will be prepared for the world of work afterward.

COVID Policies for In-Person Interaction: this section applies to you only if you will be interacting with others in-person for SI501.

For the safety of all students, faculty, and staff on campus, it is important for each of us to be mindful of safety measures that have been put in place for our protection. By returning to campus, you have acknowledged your responsibility for protecting the collective health of our community. Your participation in any in-person activities for this course is conditional upon your adherence to all safety measures mandated by the State of Michigan and the University, including maintaining physical distancing of six feet from others, and properly wearing a face covering. Other applicable safety measures may be described in the Wolverine Culture of Care and the University’s Face Covering Policy for COVID-19. Your ability to participate in this course in-person as well as your grade may be impacted by failure to comply with campus safety measures. Individuals seeking to request an accommodation related to the face covering requirement under the Americans with Disabilities Act should contact the Office for Institutional Equity. If you are unable or unwilling to adhere to these safety measures while in a face-to-face setting with respect to this course, you will be required to participate on a remote basis (if available) or to disenroll from the class. You are also encouraged to review the Statement of Students Rights and Responsibilities, which includes a COVID-related Statement Addendum.

Assignments & Lateness Policy

Assignments are described in documents maintained in the Files folder of the course Canvas site. Each assignment is due before the beginning of Lecture in the week indicated on the schedule at the end of this syllabus. Softcopy assignments should be submitted as files (e.g., not links to a Google Doc) in Canvas. You will be able to track your assignment scores in Canvas.

We make reasonable accommodations for late assignments or absence in class if you communicate a valid reason with your instructors in advance (e.g., a job interview), or if you have a valid, documented excuse.
after the fact (e.g., a sudden medical emergency). Unless we hear from you, there will be a deduction of 5% of the total possible score for each day that an assignment is turned in late, including weekend days.

If you believe any assignment was improperly graded, you can request a re-grade. Re-grade requests must be made within 48 hours of the return of the assignment. Except in cases of clear grader error, however, the entire assignment will be re-graded.

**Grade Structure**

50% of your grade in SI 501 will come from individual elements, and 50% from team elements:

- Reading quizzes [10%, individual]
- Pass/fail assignments [5%, team/individual]
- Background research report [10%, individual]
- Interview protocol [10%, team]
- Annotated notes from interviews and observations [10%, individual]
- Affinity wall walkthrough [10%, team]
- Final in-class presentation [10%, team]
- Final project report [15%, team]
- Participation (as part of teams, in class discussion, etc.) [20%, individual]

There is no final exam in this course.

Participation is a significant element of this course. The most important form of participation is to contribute your fair share of work to your team. Other elements of participation include contributing to discussion in Lecture or Discussion sections, and contributing meaningful comments/questions to chat during Lecture or Discussion. If you cannot or do not participate in the real-time discussions in Lecture, you should try to contribute in your Discussion section.

**Team Engagement**

A large part of your work will take place in a team of 3-5 students. Good teamwork is an essential skill in any knowledge-work career, and it will be important for success in the course. One of the best predictors of good teamwork is the degree to which team members contribute equally to discussion (Woolley et al. 2015). If you are someone who tends to dominate conversation, please make an effort to ask other team members for their thoughts. If you are someone who tends to be quiet, please make an effort to speak up.

In previous instances of this course, about 95% of the teams functioned well. The remaining 5% experienced one of the following challenges: (1) a team member shows disrespect or causes offense to another team member; (2) team members have substantial personality conflicts with one another; or (3) one or more team members does not do their fair share of the work for the team. Whatever the case, if you feel you have a difficulty with one or more team members, please let your GSI know right away.

Problem (1) is unacceptable. We expect that students will treat each other respectfully, regardless of differences in background, identity, nationality, or first language. If you feel a teammate has treated you with disrespect, please do not hesitate to let the instructional staff know.

Problems (2) and (3) are problems that most of us will unfortunately experience during our professional careers. Here, too, we encourage you to keep your GSI informed, but we will first ask you to try to resolve the issue yourself, using methods discussed in the 2nd week of class.
Sometimes, these situations may persist through the semester. As long as you keep your GSI informed, we will attempt to grade fairly, taking the contributions of individual team members into account if such problems arise.

At the end of the semester, everyone will be asked to fill out an anonymous questionnaire indicating the contributions of other team members. We will incorporate your teammates’ assessments of your contributions in your final participation score.

**Online Engagement**

Most course elements will occur online on Zoom. The University of Michigan has a school-wide license for Zoom. It is strongly recommended that you create and use a umich Zoom account. These accounts do not have the restrictions of the free version of Zoom (which, for example, ends calls after 45 minutes), and they can be merged with any personal Zoom accounts you may already have. To sign up, follow these instructions: [https://its.umich.edu/communication/videoconferencing/zoom/getting-started](https://its.umich.edu/communication/videoconferencing/zoom/getting-started).

During class, please do the following:

- Keep your microphone muted except when you are speaking to the class.
- Keep your video on. It is very difficult for us not to have some sense of your collective reactions while teaching.
- Make the visible name in Zoom meetings the name you prefer to be called followed by your family name, e.g., “Anna Lee” if you like to be called “Anna,” your family name is “Lee.” Instructions for how you can change your name are here: [https://teamdynamix.umich.edu/TDClient/30/Portal/KB/ArticleDet?ID=746](https://teamdynamix.umich.edu/TDClient/30/Portal/KB/ArticleDet?ID=746).
  - During lecture, please also add your Discussion section, like this: “Anna Lee (003)”. You can rename yourself for a single Zoom session according to the instructions at the bottom of the website above.
- Feel free to enter relevant comments and/or questions in the chat box at any time. *Meaningful* comments/questions will count toward your participation grade.

**Academic Integrity, Plagiarism, & Citation**

Unless otherwise specified in an assignment all submitted work must be your own, original work. Any excerpts, statements, or phrases from the work of others must be clearly identified as a quotation, and a proper citation provided. Any violation of the School’s policy on Academic and Professional Integrity (stated in the Master’s and Doctoral Student Handbooks) will result in serious penalties, which might range from failing an assignment, to failing a course, to being expelled from the program. Violations of academic and professional integrity will be reported to UMSI Student Affairs. Consequences impacting assignment or course grades are determined by the faculty instructor; additional sanctions may be imposed by the assistant dean for academic and student affairs.

Plagiarism is a serious offense. Please be sure to know what it is and to avoid it. Students who have not attended university in the United States should be aware that standards at the University of Michigan may differ considerably from what you are used to. The SI Master's Student Handbook contains definitions and associated consequences, but here are some points for emphasis:

- Each time you quote or paraphrase what someone else has said or written, it should be clear what the source is.
• Use standard citation practices when you are referencing your textbook, readings, other published material, and even facts and figures that are not common knowledge. Typically, these include an in-text citation that looks like this (Lee 1999), along with a bibliographic entry at the end of the document in a section titled “References,” like this:


• If you have any doubt about whether to cite or not, cite. *All* websites used as sources should be referenced and cited. This includes client webpages.
• Documents (whether written by an individual or as a team) should use a single consistent citation format (e.g., pick one of APA, Chicago, MLA, etc. See [http://guides.lib.umich.edu/citationhelp](http://guides.lib.umich.edu/citationhelp)).
• For this course, when referencing client-based conversations and internal client documents, they do not need to be cited formally. However, the source of the information should be clear. For example: “User 3 mentioned that …” or, “The Acme Company employee handbook states that…”
• *All* team-based work should include the names of all team members who participated.
• If you worked with someone on an individual assignment, you must list any and all collaborators on your written submission and indicate what part they played.
• Anything you formally submit must avoid plagiarism and follow the rules above. Even if you plan to resubmit an assignment again later, the *first* submission must cite sources, etc.

**English Communication**

SI 501 demands considerable communication, both in written and spoken forms. High-quality English communication is both an expectation and a goal of instruction. However, grading with respect to English will be relaxed for students who are not native English speakers and who did not attend undergraduate programs taught in English. Whatever your status, it is important for you to strive for the clearest English that you can produce, and that it is *your own*.

If writing presents a challenge for you (regardless of your native language), we strongly recommend that you consult with the *Sweetland Center for Writing* ([https://lsa.umich.edu/sweetland](https://lsa.umich.edu/sweetland)), well before an assignment is due.

**Addressing Instructors**

Please address faculty and GSIs by their *first names*. We request this partly to help you learn the standards of professional work in most United States contexts. (These standards may differ in other parts of the world.)

**Accommodations for Students with Disabilities**

If you need an accommodation for a disability, please let the instructional staff know at your earliest convenience. Some aspects of this course, the assignments, the in-class activities, and the way we teach may be modified to facilitate your participation and progress. As soon as you make us aware of your needs, we can work with the Office of Services for Students with Disabilities (SSD) to help us determine appropriate accommodations. SSD (734-763-3000; [http://ssd.umich.edu/](http://ssd.umich.edu/)) typically recommends accommodations through a Verified Individualized Services and Accommodations (VISA) form. I will treat any information that you provide in it in as confidential a manner as possible.
Mental Health and Well-Being

We will make any reasonable accommodation for students facing mental health challenges, diagnosed or not. There is a formal process for this (outlined in the next paragraph), but we are aware that it can be slow. If you anticipate needing accommodation for mental health reasons, please communicate with your GSI or instructors. Wherever possible, we will accommodate. (Please be aware, however, that the instructional staff are not trained counselors – you should contact OASA and/or CAPS, if you need help beyond course accommodations.)

The University of Michigan is committed to advancing the mental health and wellbeing of its students, while acknowledging that a variety of issues, such as strained relationships, increased anxiety, alcohol/drug problems, and depression, directly impacts students’ academic performance. If you or someone you know is feeling overwhelmed, depressed, and/or in need of support, services are available. For help, contact Counseling and Psychological Services (CAPS) at (734) 764-8312 during and after hours, on weekends and holidays. You may also consult University Health Service (UHS) at (734) 764-8320, or for alcohol or drug concerns, see the list of resources on their web site. Since many students are remote during Winter 2021, CAPS COVID-19 Support features SilverCloud, an online, self-guided, interactive mental health resource that provides cognitive behavioral interventions. For a more comprehensive listing of the broad range of mental health services available on campus, please visit Mental Health Services at UHS.

Other Help on Campus

Michigan students have access to many services that provide guidance and support at no cost for academic and personal concerns. Resources most relevant for SI 501 are listed below. Your instructors can also help -- start with your GSI.

- **Sweetland Center for Writing** ([https://lsa.umich.edu/sweetland](https://lsa.umich.edu/sweetland)) offers help with writing in English. Sign up for free one-on-one coaching sessions to improve drafts of written assignments. Students with limited experience writing in English are strongly encouraged to sign up for sessions to work on writing.
- MLibrary's librarians can help with research, sources, and citation. Rebecca Welzenbach ([rwelzenb@umich.edu](mailto:rwelzenb@umich.edu)) is U-M’s Information Librarian.
- The **Knox Center Adaptive Technology Computing Center** ([https://its.umich.edu/computing/accessible-computing/atcs](https://its.umich.edu/computing/accessible-computing/atcs)) can help with text-to-speech or other accessible computing needs, regardless of whether you have a disability.

Open Door / No Fear / No Retaliation Policy

As instructional staff, we are dedicated to your learning. If you have any problems, concerns, questions, or issues, as they might pertain to the course, including personal situations that may affect your ability to participate or complete assignments, please let your GSI and/or the instructor know! We promise to listen. We promise to accommodate reasonable requests. We promise that your grade will not be impacted by your raising of issues. We cannot promise that we will respond as you wish to every request we receive, but we promise to take every request seriously. Also, we promise to keep issues confidential, unless we have your permission to make the situation known to others whom it might concern.
Online Resources

- [https://umich.instructure.com/courses/437583](https://umich.instructure.com/courses/437583) (Canvas) -- All course assignments and reading materials (except those from the textbook) will be available here.
- [http://guides.lib.umich.edu/si501](http://guides.lib.umich.edu/si501) (Research Guide)

Questions

Don’t hesitate to ask questions of the faculty instructor ([antheaj@umich.edu](mailto:antheaj@umich.edu)) or your GSI ([cedsteve@umich.edu](mailto:cedsteve@umich.edu)). If you’re not sure whom to ask, send a mail to [SI501Instructors-W21-006@umich.edu](mailto:SI501Instructors-W21-006@umich.edu) which will go to both instructors.

Note: Minor changes to the syllabus may be made throughout the semester. Please see the version uploaded to Canvas for the latest version.
<table>
<thead>
<tr>
<th>Week</th>
<th>Class Topics</th>
<th>Readings Due</th>
<th>Assignments Due</th>
<th>Client Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan. 18</td>
<td><em>Martin Luther King Jr. Day – no class</em></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>#1</td>
<td>Jan. 25: Course overview</td>
<td><em>None</em></td>
<td>To be announced in lecture.</td>
<td>Team-client matching announced before next class.</td>
</tr>
<tr>
<td></td>
<td>First day activity</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Inter-group communication</td>
<td>Barczak et al. (2010) – Try to understand the concepts, even if you don’t understand the modelling/statistics.</td>
<td>Initial Client Contact Plan (due: Feb 5 @ 5pm)</td>
<td>Schedule initial meeting with client contact.</td>
</tr>
<tr>
<td></td>
<td>Initial client contact</td>
<td>Holtzblatt et al. (2005), Chap. 3 (pp. 63-78)</td>
<td></td>
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<tr>
<td></td>
<td>Collaboration plan</td>
<td></td>
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<tr>
<td></td>
<td>Background research</td>
<td>Dowell &amp; Carter (n.d.)</td>
<td></td>
<td>Schedule interviews.</td>
</tr>
<tr>
<td></td>
<td>Library introduction</td>
<td>Background Research Report assignment instructions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#4</td>
<td>Feb. 15: Introduction to interview and observation protocols</td>
<td>Holtzblatt et al. (2005), Chap. 4 (pp. 79-100)</td>
<td>Any work toward Background Research Report – required: cover page and bibliography</td>
<td>[Do not start interviews yet!]</td>
</tr>
<tr>
<td>Week</td>
<td>Class Topics</td>
<td>Readings Due</td>
<td>Assignments Due</td>
<td>Client Activity</td>
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<tr>
<td>#6</td>
<td>Mar. 1</td>
<td>Models</td>
<td>Beyer &amp; Holtzblatt (1997), Ch. 6 Work Models</td>
<td>Any work toward Background Research Report – recommended: 1000 words</td>
</tr>
<tr>
<td></td>
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<td></td>
<td>Affinity Wall assignment document (in Canvas)</td>
<td>[Optional] Interview Protocol revisions due</td>
</tr>
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<td></td>
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<td></td>
<td>None</td>
<td>Conduct interviews.</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Annotated Interviews Notes</td>
<td>Conduct interviews.</td>
</tr>
<tr>
<td>#9</td>
<td>Mar. 29</td>
<td>Affinity wall walkthroughs w/peer feedback None</td>
<td>Affinity Wall Walkthrough Affinity Wall Walkthrough</td>
<td>Hold secondary interviews or get feedback from client. Meet with Anthea.</td>
</tr>
<tr>
<td>#10</td>
<td>Apr. 5</td>
<td>Communicating findings via Scupin (1997) Consulting Methodology (2014) [Optional] Background</td>
<td>[Optional] Background</td>
<td>Hold secondary interviews or get feedback from</td>
</tr>
<tr>
<td>Week</td>
<td>Class Topics</td>
<td>Readings Due</td>
<td>Assignments Due</td>
<td>Client Activity</td>
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<tr>
<td>#11</td>
<td>presentations and reports</td>
<td></td>
<td>Research Report revision</td>
<td>client. Meet with Anthea.</td>
</tr>
<tr>
<td>Apr. 12</td>
<td>Team presentations with peer feedback</td>
<td>None</td>
<td>Presentation</td>
<td>Present to client.</td>
</tr>
<tr>
<td>#12</td>
<td>Finish team presentations with peer feedback</td>
<td>None</td>
<td>Final Project Report</td>
<td>Present to client.</td>
</tr>
<tr>
<td>Apr. 19</td>
<td>Conclusion</td>
<td></td>
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</tbody>
</table>

No Final Exam

List of Readings

Links to original online sources are provided below, but all reading materials will be available on Canvas.


- This book is NOT required for SI 501. However, it is listed here because some of the skills taught in SI 501 are adapted from content in this book.

**Reference** (cited in the syllabus)