SI 501: Contextual Inquiry  Last updated: September 20, 2021

SI 501-001: CONTEXTUAL INQUIRY AND CONSULTING FOUNDATIONS
Syllabus for Fall 2021

INSTRUCTORS

Name: Kentaro Toyama (toyama@umich.edu) Office Hours: Th 9-11am, sign up at https://j.mp/toyamaAppt, or by appt.¹

GRADUATE STUDENT INSTRUCTORS (GSIs)

Name: Damon Carucci (kcarucci@umich.edu) Office Hours: Tue, 9-11am https://umich.zoom.us/j/91067429459
Name: Annie Flynn (flynnca@umich.edu) Office Hours: Mon, 1-2pm https://umich.zoom.us/j/8994107610
Name: Halima Haque (hkhaque@umich.edu) Office Hours: Mon, 12-2pm https://umich.zoom.us/j/94898820407
Name: Sonny Kim (sonnykim@umich.edu) Office Hours: Wed, 1-3pm https://umich.zoom.us/j/5886642159

You are matched to one GSI, based on your Discussion section (see below).

LECTURE

001 Mon, 9-11am https://umich.zoom.us/j/7412801664
Note: You must be logged in with your umich.edu credentials.

DISCUSSION SECTIONS

<table>
<thead>
<tr>
<th>Sec #</th>
<th>Day/Time</th>
<th>Room</th>
<th>GSI</th>
<th>Zoom</th>
</tr>
</thead>
<tbody>
<tr>
<td>003</td>
<td>Mon, 3-4pm</td>
<td>1255 NQ</td>
<td>Damon</td>
<td><a href="https://umich.zoom.us/j/97858815566">https://umich.zoom.us/j/97858815566</a></td>
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<tr>
<td>005</td>
<td>Mon, 4-5pm</td>
<td>2011 MLB</td>
<td>Halima</td>
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<tr>
<td>007</td>
<td>Mon, 11am-noon</td>
<td>506 BMT</td>
<td>Halima</td>
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<td>009</td>
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<td>Sonny</td>
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</tr>
<tr>
<td>011</td>
<td>Tue, 3-4pm</td>
<td>1448 MH</td>
<td>Sonny</td>
<td><a href="https://umich.zoom.us/j/5886642159">https://umich.zoom.us/j/5886642159</a></td>
</tr>
<tr>
<td>013</td>
<td>Tue, 3-4pm</td>
<td>2185 NQ</td>
<td>Damon</td>
<td><a href="https://umich.zoom.us/j/97639786184">https://umich.zoom.us/j/97639786184</a></td>
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<tr>
<td>015</td>
<td>Mon, noon-1pm</td>
<td>2306 MH</td>
<td>Annie</td>
<td><a href="https://umich.zoom.us/j/8994107610">https://umich.zoom.us/j/8994107610</a></td>
</tr>
</tbody>
</table>

Zoom links above are shown for students who choose virtual interaction. In addition to your section meeting day/time, please remember your GSI’s name and section number (003-015 – depending on which section you signed up for in WolverineAccess)! There may be multiple Discussion sections meeting at the same time, so you need to know which one is the right one.

Introduction

Welcome to the University of Michigan School of Information and to SI 501! Early in the semester, you should at least skim this syllabus, so that you have a sense for course requirements and the approach of the instructors. As the course progresses, there will be moments when the details of the syllabus also become relevant. Please ask us (si501staff001@umich.edu), if you have any questions about the course at any time!

¹ To make an appointment, please check my umich calendar and send me an invite: https://j.mp/toyamaCal.
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 work flow, 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, you will be able to…
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.

Class Structure
The University of Michigan is planning to be open for fully in-person instruction this Fall, and this course will be taught in person for the most part. We are aware, however, that many students will not be able to participate in person, and we will support virtual learning, as well. It is expected, though, that all students participate synchronously; you should plan to be present for most Lectures and Discussion sections at the scheduled times. Occasional exceptions will be accommodated through class recordings, etc., but these should be exceptions; in particular, we do not allow enrollment in other courses that conflict with your Lecture/Discussion sections. Depending on the situation with the COVID pandemic, however, any of the above may change during the semester.

You should be enrolled in exactly one Lecture (001) and one Discussion section (003, 005, 007, 009, 011, 013, or 015). Within each Discussion section, you will be grouped into 3- to 5-person student teams that work together for the entire semester. There will be no cross-section teams.

Teams are expected to spend some time each week working together outside of class, and in some weeks, teams may spend a lot of 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.

Some teams may need 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
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. Please note that as of the start of the semester, the University of Michigan requires all students, staff, and faculty to be vaccinated, and to wear a mask when indoors. 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 properly wearing a face covering. 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 let the instructional staff know, and otherwise 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 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 and Lateness Policy
Assignments are described in documents maintained in the Files folder of the course Canvas site. Most assignments are 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. The other key types of participation are contributing to discussion in Lecture or Discussion sections (or contributing meaningful comments/questions to chat during Lecture or Discussion), and contributing to team discussion when instructors are present. If you don’t 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 this 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, with all team members happy with their teams. 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) some team members do 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 master’s students to be adults who are capable of treating one another with respect, regardless of differences in background, identity, nationality, or first language. If you feel a teammate has treated you disrespect, please do not hesitate to let the instructional staff know. At the same time, please also give one another the benefit of the doubt – people may not always intend something the way you receive it.

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 a technique that will be discussed in the second class. If that doesn’t improve the situation, your GSI can help mediate. And if that doesn’t help, an instructor will step in. Often, these situations persist to some extent through the semester. As long as you keep your GSI informed, we will attempt to grade fairly so that any student who creates problems for the team, or who does not contribute their fair share of work, cannot “freeload” from the efforts of the other members.

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**

If you participate virtually, or have teammates who do, you will need to use Zoom, for which the University of Michigan has a school-wide license. 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).

If you are attending virtually, 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 for your collective reactions while teaching.
- Make the visible name in Zoom meetings the name you prefer to be called, followed by your family name, Discussion section number, and optionally your gender pronouns: e.g., “Anna Lee
(005; she/her)” if you like to be called “Anna,” your family name is “Lee,” you’re in Discussion 005, and you use she/her pronouns. Instructions for how you can change your name are here: https://teamdynamix.umich.edu/TDClient/30/Portal/KB/ArticleDet?ID=746.

- 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, and 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, as required by the school. 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 and Wikipedia!!!
- 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 an expectation and to some extent, 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, what is important is for you to strive for the clearest, best English that you can produce, and that it be your own.
If writing presents a challenge for you (regardless of your native language), we strongly recommend that you make appointments with Sweetland Writing Center, well before an assignment is due. (See below.)

**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 think 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 will try to make appropriate accommodations. In some cases, we 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. We will treat any information that you provide in as confidential a manner as possible.

**Student 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 instructor. 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 and [https://caps.umich.edu/](https://caps.umich.edu/) during and after hours, on weekends and holidays. You may also consult University Health Service (UHS) at (732) 764-8320 and [https://www.uhs.umich.edu/mentalhealthsvcs](https://www.uhs.umich.edu/mentalhealthsvcs), or for alcohol or drug concerns, see [www.uhs.umich.edu/aodresources](http://www.uhs.umich.edu/aodresources). Since many students are remote during fall 2020, 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: [http://umich.edu/~mhealth/](http://umich.edu/~mhealth/).

**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 Writing Center (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 assignments.
- MLibrary's librarians can help with research, sources, and citation. Rebecca Welzenbach (r welzenb@umich.edu) is U-M’s Information Librarian.
The Knox Center Adaptive Technology Computing Center can help with text-to-speech or other accessible computing needs, regardless of whether you have a disability (http://www.itcs.umich.edu/atcs/computing-site.php).

**Online Resources**

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

**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 instructors 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.

As an indication of this commitment, here is a true story: When this course was taught in 2019, a student found that one of the assigned readings referred to content that was deeply offensive and hurtful to them. They told their GSI; their GSI told the instructor. The instructor admitted not being aware of the issue, understood the problem, apologized to the student, held a discussion with the class about the content and why it was offensive, and promised to change the reading in the future. Starting 2020, that paper was taken off the reading list.

Another true story: One student experienced multiple, severe tragedies in their personal life during the semester. They told their GSI and instructor. While unable to address the student’s underlying challenges, we relaxed all assignment due dates for the student, and worked with their team to ensure that the team was able to make progress while also allowing the student to make meaningful contributions. At one point, the student considered filing for an “incomplete” grade as they were slated for a C-. The instructor advised that it was up to them, but that incomplete courses are rarely completed, and that if the student finished one of the big assignments they were missing, they would have a much better grade. The student managed to finish two with relaxed deadlines, and completed the course with an A-.

In other words, if in doubt, please contact your GSI and/or instructor!

**Questions?**

Don’t hesitate to ask questions of the instructor (toyama@umich.edu) or your GSI by email or in person at any time. If you’re not sure whom to ask, send a mail to si501staff001@umich.edu; this alias includes all of the GSIs and the instructor.

**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>#1 Aug. 30</td>
<td>Course overview Special first day activity</td>
<td>None</td>
<td>To be announced in lecture.</td>
<td>Team-client matching announced before next class.</td>
</tr>
<tr>
<td>Sept. 6</td>
<td>Labor Day – no class</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>#2 Sept. 13</td>
<td>Team dynamics Inter-group communication Initial client contact Collaboration plan Library introduction</td>
<td>Course overview Tuckman (1965) – Read only pp. 384-387 and pp. 393-end. Barczak et al. (2010) – Try to understand the concepts, even if you don’t understand the modelling/statistics. Holtzblatt et al. (2005), Chap. 3 (pp. 63-78)</td>
<td>Due end of Tuesday (see assignments)… Collaboration Plan Initial Client Contact Plan</td>
<td>Send initial client emails. Schedule initial meeting with client contact.</td>
</tr>
<tr>
<td>#3 Sept. 20</td>
<td>Consulting professionalism Background research</td>
<td>Webster &amp; Watson (2002) Dowell &amp; Carter (n.d.) Background Research Report assignment instructions</td>
<td></td>
<td>Hold initial meeting with client. Schedule interviews. [Do not start interviews yet!]</td>
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<tr>
<td>#4 Sept. 27</td>
<td>Introduction to interview and observation protocols Library</td>
<td>Holtzblatt et al. (2005), Chap. 4 (pp. 79-100) Weiss (1995), “Learning from Strangers” excerpt</td>
<td>Any work toward Background Research Report – required: cover page and bibliography</td>
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</tr>
<tr>
<td>#</td>
<td>Date</td>
<td>Assignment Description</td>
<td>Reference</td>
<td>Action</td>
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<tr>
<td>#6</td>
<td>Oct. 11</td>
<td>Models</td>
<td>Beyer &amp; Holtzblatt (1997), Ch. 6 Work Models</td>
<td>Conduct interviews.</td>
</tr>
<tr>
<td>#7</td>
<td>Oct. 25</td>
<td>Affinity walls, Practice with affinity wall notes</td>
<td>Affinity Wall assignment document (in Canvas)</td>
<td>Conduct interviews.</td>
</tr>
<tr>
<td>#8</td>
<td>Nov. 1</td>
<td>Brainstorming solutions</td>
<td>None</td>
<td>Conduct interviews.</td>
</tr>
<tr>
<td>#9</td>
<td>Nov. 8</td>
<td>Affinity wall walkthroughs w/peer feedback</td>
<td>None</td>
<td>Affinity Wall Walkthrough</td>
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<tr>
<td></td>
<td>Nov. 22</td>
<td>Thanksgiving Week – no class</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#11</td>
<td>Nov. 29</td>
<td>Team presentations with peer feedback</td>
<td>None</td>
<td>Presentation</td>
</tr>
<tr>
<td>#12</td>
<td>Dec. 6</td>
<td>Finish team presentations with peer feedback</td>
<td>None</td>
<td>Final Project Report</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Conclusion</td>
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</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.
- Print copies are available via course reserve at MLibrary’s Ask the Media Center on the second floor of the Shapiro Undergraduate Library. You can check out a copy for four hours at a time.
- The textbook is also available as an eBook through MLibrary’s Safari Books Online subscription at [http://mirlyn.lib.umich.edu/Record/012377294](http://mirlyn.lib.umich.edu/Record/012377294). Note: The eBook can only be read online by seven simultaneous users.

**Reference** (cited in the syllabus)