SI 501: CONTEXTUAL INQUIRY AND CONSULTING FOUNDATIONS
Syllabus for Fall 2019

Prof. Kentaro Toyama (toyama@umich.edu)
Office hours: Thursdays 9am-11am, 3439 NQ (schedule appointments here: http://bit.ly/toyamaUMcal, or just drop by and take your chances). You can also schedule appointments with me for any reason by checking free/busy times in my umich calendar, and sending me a calendar invitation.

Lecture 001: Mondays, 9-11am, 100 HUTCH
Section 003: Mondays, 3-4pm, 1255 NQ
  • GSI: Yixin Zou (yixinz@umich.edu)  Office hours: Tues, 2-4pm, 1278 NQ

Section 004: Mondays, 4-5pm, 1255 NQ
  • GSI: Lindsay Brown (likathry@umich.edu)  Office hours: Tues, 2-4pm, 1277 NQ

Section 005: Mondays, 6-7pm, 1255 NQ
  • GSI: Sylvia Simioni (ssimioni@umich.edu)  Office hours: Tues, 11:30am-1:30pm, 1274 NQ

Section 010: Mondays, 4:30-5:30pm, 2245 NQ
  • GSI: Carol Zhang (qiaoning@umich.edu)  Office hours: Tues, 1-3pm, 1243 NQ

Lecture 002: Mondays, 1-3pm, G322 DENT
Section 006: Mondays, 3:30-4:30pm, 2245 NQ
  • GSI: Liz Marquis (ebmorris@umich.edu)  Office hours: Thurs, 10am-noon, 1278 NQ

Section 007: Mondays, 5-6pm, 1255 NQ
  • GSI: Killian Carucci (kcarucci@umich.edu)  Office hours: Thurs, 1-3pm, 1243 NQ

Section 008: Mondays, 7-8pm, 1255 NQ
  • GSI: Robert Markum (rmarkum@umich.edu)  Office hours: Thurs, noon-2pm, 1278 NQ

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 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 able to:
1. Collect, represent, and analyze qualitative data about a workflow, process, product, or service, by…
   a. Conducting semi-structured interviews;
   b. Observing work processes;
   c. Processing interview notes into discrete pieces of qualitative data; and
d. Analyzing qualitative data using affinity walls.

2. Demonstrate the basic principles of human-centered contextual inquiry.

3. 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
Each student is expected to be enrolled in one lecture (001 or 002) and one section (003, 004, 005, 006, 007, 008, or 010). Within each section, students are grouped into 3-5 person teams that stay together for the entire semester; there will be no cross-section teams. Because of this, though the content of the two lectures will be the same, students in Lecture 001 should be in Section 003, 004, 005, 010; students in Lecture 002 should be in Section 006, 007, or 008. No exceptions about this will be made.

Teams are expected to spend at least an hour 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 weekly meeting times with your teams early on for the rest of the semester. You can always cancel meetings if they are not needed.

Assignments and 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 your 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 for 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). Otherwise, there will be a deduction of 5% of the total possible score for each day that an assignment is turned in late, including weekends.

Requests for a re-grade must be made within 48 hours of the return of an 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 assignments, and 50% from team assignments:

- Reading quizzes [10%, individual]
- Pass/fail assignments [5%, team]
- Background research report [10%, individual]
- Interview protocol [10%, team]
- Annotated notes from interviews and observations [10%, individual]
- Affinity wall walkthrough [10%, individual]
- 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.
Device Use in Class
SI 501 has many in-class activities, so bring your laptops to each class.

However! Except for those who require them for accessibility or accommodation, use of laptops, smartphones, and other digital devices are prohibited in class, except when they are needed for activities. In particular, devices should be closed, face down, or turned off during lectures, class discussion, and student presentations.

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. 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, or other published material.
- 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).
- 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 in the final work.
- 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; at the same time, accommodation in grading will be made for students who are not native English speakers and who did not attend undergraduate programs taught in English. For all students, what’s important is to strive for clear, well-formed English that is your own.
Accommodations for Students with Disabilities
The University of Michigan is committed to providing equal opportunity for participation in all programs, services and activities. Request for accommodations by persons with disabilities may be made by contacting the Services for Students with Disabilities (SSD) Office (http://ssd.umich.edu) located at G664 Haven Hall. The SSD phone number is 734-763-3000. Once your eligibility for an accommodation has been determined you will be issued a verified individual services accommodation (VISA) form. Please present this form to me at the beginning of the term, or at least two weeks prior to the need for the accommodation (test, project, etc…). All reasonable requests will be accommodated in consultation with the Office of Services for Students with Disabilities.

Student Mental Health and Well-Being
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/ during and after hours, on weekends and holidays or through its counselors physically located in schools on both North and Central Campus. You may also consult University Health Service (UHS) at (732) 764-8320 and https://www.uhs.umich.edu/mentalhealthsvcs, or for alcohol or drug concerns, see www.uhs.umich.edu/aodresources. For a more comprehensive listing of the broad range of mental health services available on campus, please visit: http://umich.edu/~mhealth/.

Other Help on Campus
Michigan students have many on-campus centers 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 (1st floor, North Quad) 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. Shevon Desai 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)

Questions?
Don’t hesitate to ask questions of the instructor (toyama@umich.edu) or the GSIs (see above) by email or in person at any time. If you’re not sure whom to ask, send a mail to si501staff@umich.edu; this alias includes all of the instructors.

Note: Minor changes to the syllabus may be made throughout the semester. Please see the version uploaded to Canvas for the latest version.
## SCHEDULE

<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</td>
<td>Course overview</td>
<td>None</td>
<td>To be announced in lecture.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Special first day activity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sept. 9</td>
<td>Team dynamics</td>
<td>Course overview</td>
<td>Due end of day or week (see assignments)…</td>
<td>Send initial client emails.</td>
</tr>
<tr>
<td>#2</td>
<td>Inter-group communication</td>
<td>Tuckman (1965) -- Read only pp. 384-387 and pp. 393-end.</td>
<td>Collaboration Plan</td>
<td>Schedule initial meeting with client contact.</td>
</tr>
<tr>
<td>Sept. 16</td>
<td>Initial client contact</td>
<td>Engel et al. (2014)</td>
<td>Initial Client Contact Plan or Design Challenge Spec</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Collaboration plan</td>
<td>Holtzblatt et al. (2005), Chap. 3 (pp. 63-78)</td>
<td></td>
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<tr>
<td></td>
<td>Library introduction</td>
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<tr>
<td>#3</td>
<td>Consulting professionalism</td>
<td>Webster &amp; Watson (2002).</td>
<td></td>
<td>Hold initial meeting with client.</td>
</tr>
<tr>
<td>Sept. 23</td>
<td>Background research</td>
<td>Dowell &amp; Carter (n.d.).</td>
<td></td>
<td>Schedule interviews.</td>
</tr>
</tbody>
</table>
|      | | | Any work toward Background Research Report – recommended: outline + a few hundred words draft | [
|      | Introduction to interview and observation protocols | Holtzblatt et al. (2005), Chap. 4 (pp. 79-100) | [Do not start interviews yet!] |
| Sept. 30 | Interviewing practice | None (no readings means no quiz, either) | Interview Protocols + any work toward Background Research Report – recommended: cover page and bibliography | Schedule / conduct interviews. |
|      | Post-interview interpretation sessions | | | |
| #5   | | | | Schedule / conduct interviews. |
| Oct. 7 | | | | |
| #6   | Models | Interpretation Session Guidelines (in Canvas) | Background Research Report | Conduct interviews. |
| Oct. 21 | | Beyer & Holtzblatt | | |
|-----|---------|----------------|-----------------------------------|---------------------------------------------|---------------------|
|     |         | Practice with affinity wall notes |                     |                                             |                     |
| #8  | Nov. 4  | Brainstorming solutions | None | Annotated Interviews Notes | Conduct interviews. |
|     |         |                             |                     |                                             |                     |
| #9  | Nov. 11 | Affinity wall walkthroughs w/peer feedback | | Affinity Wall Walkthrough | Hold secondary interviews or get feedback from client. Meet with Kentaro. |
|     |         |                             |                     |                                             |                     |
|     |         |                             |                     |                                             |                     |
| #11 | Nov. 25 | [No class] | | None | Hold secondary interviews or get feedback from client. |
|     |         |                             |                     |                                             |                     |
| #12 | Dec. 2  | Team presentations with peer feedback | None | Presentation | Present to client. |
|     |         |                             |                     |                                             |                     |
| #13 | Dec. 9  | Finish team presentations with peer feedback | Conclusion | Final Project Report | Present to client. |
|     |         |                             |                     |                                             |                     |

|     |                     |                |                     |                                             |                     |

No Exam

List of Readings
Links to original online sources are provided below, but all reading materials (except the textbook) are available on Canvas.


- Print copies are available via course reserve at MLibrary’s Askwith 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.


