Course Syllabus

IST 331: Foundations of Human Centered Design
(Section 002)

Spring 2017, University Park
(January 9 – April 28th)

Professor Michael D. McNeese, Ph.D.

Office: 316 IST Bldg.
mmcneese@ist.psu.edu

Class: Tuesday and Thursday
9:05 - 10:20 am

Classroom: 205 IST Bldg.

Student Hours:

Wednesday 11-noon or
Email me to make individual appointment

Teaching Assistant: Ms. Joslenne Pena, IST Ph.D. Candidate

IST Learning Assistant (Coach): Edward Ji
Course Description

General Philosophy and Values

This is a class, which is predicated on the view of social constructivism and therein is viewed as participatory, experimental, and experiential in the sense that social interactions enhance the learning of concepts, principles, and practice while providing the basis for individualistic self-reflection as well. Hence, the class will be partially mediated by group assignments, exercises, and projects but will also require significant individual requirements. Assessments of learning will be taken from multiple perspectives.

I conduct this class in a problem-based format to the extent possible. That means that the focus of the class is on finding, discovering, working on, and solving problems that are relevant to IST, and in particular for understanding the role of the human in designing complex systems. This means that you are first and foremost responsible for problem-solving involving real world situations and technologies that reify user experience and human-centered design. Some activities will be provided at the general level of constraint for you whereas other problems you will find for yourselves. Problem-solving in turn is one core value of the class.

General Course Objectives

The general objectives of this course is to expose you to broad perspective of human factors, human-computer interaction, cognitive systems, usability – as areas that inform human-centered design foundations. My areas of expertise formulate this course as broadly as possible and emphasize the engineering and design of cognitive systems in an emergent, dynamic world. Specifically the following objectives compose the course

Learning Goal 1: Understand and identify prominent Theoretical Perspectives within human systems engineering and human-computer interaction

OBJECTIVE a.: Recognize prominent scholars and their given perspectives / approaches

OBJECTIVE b.: Be able to distinguish among different theories, models, frameworks that are relevant to the design of systems, tools, and interfaces.
Learning Goal 2: Understand *Basic Principles and Processes* of human factors, human-systems integration, and user experience; and how they apply to the foundations of human-centered design

**OBJECTIVE a.** Articulate specific principles, processes, and issues that make human-centered design challenging

**OBJECTIVE b.** Apply these principles, processes, and issues to real world problems to gain comprehension of how design can impact human/team performance and errors.

Learning Goal 3: Taking goals 1 and 2 above, develop an overview of the *Research and Design (R&D) Foundations* within human factors, human-systems integration, and user experience – to quantitatively or qualitatively assesses HCD theory, principles, and processes for a given domain of interest.

**OBJECTIVE a.** Understand how to do a literature search and literature review in an area of interest

**OBJECTIVE b.** Understands experiments involving human-systems engineering

**OBJECTIVE c.** To be be able to (1) Design an experiment that tests an experimental hypotheses and evaluates human-centered design – and – (2) design a qualitative study that provides insight into human-centered design

Learning Goal 4: Develop Knowledge, Skills, and Insight into the *R&D Methods* that underlie human-centered design

**OBJECTIVE a.** Examine and gain experience with specific cognitive task analysis methods as applied to real world problems

**OBJECTIVE b.** Examine and gain experience with other design analytical methods or problem solving techniques that leverage prior cognitive task analysis methods

**OBJECTIVE c.** Become fluent with specialized tools or programs that facilitate analysis and design in objectives a. and b.

**OBJECTIVE d.** Integrate objectives 4.a.b.c. to generate a user-centered design via a case study project
Learning Goal 5: Establish Test and Evaluation Techniques to assess specific human-centered designs

OBJECTIVE a.: Gain initial experience with specific techniques such as the Usability Heuristics, Situation Awareness Assessment Techniques, and Workload Assessment.

To quickly summarize ‘what you should learn in this course’ is as follows:

- Know Theories of Human Factors
- Know Prominent People in Human Factors
- Understand Principles and Processes related to Real World Systems
- Know and use Methods and Design Technique
- Apply Methods and Design to Real Case Study
- Understand Test and Evaluation of a Design Product

As the professor in charge of this course, I expect to share my expertise and knowledge with you in a variety of ways that challenge and enhance learning. I define learning as the ability to put knowledge to use in unique ways. Therein, parts of the course will involve lectures, fieldwork, workshops, tutorials, and most especially work. I view this class as a simulation of work. This means you must be prepared to (1) be part of workgroups, and (2) come prepared to do your fair share during working hours (i.e., class time). This obviously requires some planning and commitment of time on your part. At the first session, I will hand out my expectations with respect to teamwork and team issues that may arise.

Course Materials

This course will be highly predicated on reading selected chapters from the book required for the course:

Required Reading


[Note that the PSU Library has availability as an e-book, or alternatively a hard copy may be purchased from the PSU Book Store.

There also be a few additional papers that I will provide access to that complete the readings.

The readings required for this course will all be completed by March 14th.
Learning Hint

You must read the book and designated papers for this course in order to do even a sufficient - let alone an excellent job - on the mid-term exam. It is better to read the chapters/papers at the time designated in the schedule to coincide with lectures and activities to obtain the maximum learning productivity for the course.
### Course Schedule of Activities

<table>
<thead>
<tr>
<th>Week/Date</th>
<th>Topic - Focus</th>
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<tbody>
<tr>
<td>1 T – 1/10</td>
<td>Introduction to the Course</td>
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<td>Orientation to the Course / Overview of Syllabus</td>
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<td>Course Policies and Procedures</td>
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<td>- attendance / coming to class late</td>
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<td>- use of cell phones during class</td>
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<td>- focus and attention and respect during class presentations</td>
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<td></td>
<td>Do MBTI assessment in class</td>
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<td></td>
<td>Go to <a href="http://www.humanmetrics.com/cqi-win/jtypes2.asp">http://www.humanmetrics.com/cqi-win/jtypes2.asp</a></td>
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<td>Takes about 10 mins</td>
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**Preps for Thursday:**

- Read and review your syllabus
- Read short Z Problem Solving Article


<table>
<thead>
<tr>
<th>1 R – 1/12</th>
<th>Part 1 Introduction to Work and Human Performance</th>
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<tr>
<td></td>
<td>Topic 1. Individual Differences in Work / Performance</td>
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<tr>
<td><strong>Activities:</strong></td>
<td>• SHAPE framework and MBTI lecture (Dr. McNeese)</td>
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<td>• Team Activities involving different personality types</td>
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**Readings for Next Week**

- (Johnson - Introduction to the book and Chapter 1)
Part 1 Introduction to Work and Human Performance

Topic 2a. What is work, performance, teamwork, context?

Topic 2a. Errors, mistakes, miscues in work – Joslenne Pena lecture

Activities: • In-class demonstration and examples (Dr. McNeese)

Part 1 Introduction to Work and Human Performance

Topic 3. What defines HF, HCD, UX, HIS, HSD, and so on?

Activities: • class online discussion / brainstorm re finding definitions

Readings for Next Week

• (McNeese & Forster – Introduction to the Living Laboratory, in press)
• (McNeese & Pfaff – Macrocognition, 20xx) or Intel Analyst paper
• AKADAM (Zaff, McNeese, & Snyder, 1993)

Part 2. The Living Laboratory Framework: Methods and Approaches I

Topic 1. The use of Standards and Guidelines in HF/HCD

Topic 2. Knowledge Acquisition and Ethnography

Activities: • example of Mil-Std 1472 applied to pilot-cockpit interaction
• concept map exercise in-class
• fieldwork in situ in IST

Part 2. The Living Laboratory Framework: Methods and Approaches II

Topic 2. Design storyboarding, Design Prototyping and catch-up

Activities: • Crazy 8s design studio exercise

Readings for Next Week

• NeoCities Paper
• tbd
4 T – 1/31  Part 2. The Living Laboratory Framework: Methods and Approaches III

Topic 3. Models and Simulations

Activities:
• MAUT model making in class

4 R – 2/2  Work Day for Dyads - prepare for upcoming book chapter presentation

Readings for next week

• (Johnson – Chapters 2 to 5)
• paper on auditory and other sensory integration tbd

One-Day Human Factors Journal Due at 5pm today

5 T – 2/7  Part 3. Human Cognitive Factors in Work / in Context

Topic 1. Sensation and Perception

Team 1 presents -- Vision and Gestalt Structure (Johnson - Chapter 2)

Team 2 presents -- Visual Analytics (Johnson - Chapter 3)

Team 3 presents -- Color Vision (Johnson - Chapter 4)


Topic 1. Sensation and Perception /continues

Team 4 presents -- Peripheral Vision – Visual Search (Johnson - Chapter 5)

Team 5 presents -- Auditory and Other Senses

Readings for next week

• (Johnson – Chapters 6 to 9)
• paper on situation awareness (Endsley) tbd


Topic 2. Human Information Processing /
Team 6 presents -- Language and Reading (Johnson - Chapter 6)

Team 7 presents -- Attention and Memory I (Johnson - Chapter 7)

Team 8 presents -- Situation Awareness (special reading - Endsley)


Topic 2. Human Information Processing / continued

Team 9 presents -- Planning, Thoughts, and Actions (Johnson - Chapter 8)

Team 10 presents -- Advanced Memory II (Johnson - Chapter 9)

Team 11 presents -- Situation Awareness (special reading - Endsley)

Readings for next week:

• (Johnson – Chapters 10 to 12)


Topic 2. Human Information Processing / continued

Team 12 presents -- Learning & Problem Solving I (Johnson - Chapter 10)

Team 13 presents -- Learning & Problem Solving II (Johnson - Chapter 11)

Team 14 presents -- Decision Making & Judgment (Johnson - Chapter 12)

Readings for next week:

• (Johnson – Chapters 13 and 14)

• (HCI paper tbd)


Topic 1. Ecological Psychology

Team 15 presents -- Motor movements and action (Johnson - Chapter 13)

Team 16 presents -- Temporal Constraints & Pickup (Johnson - Chapter 14)

Team 17 presents -- Human-Computer Interaction (tbd)
At this point all triad teams will have presented Chapters and Articles.

Readings for next week:

- (Discog experiment paper on hidden knowledge, McNeese et al. tbd)
- (ABAIS – Hudlicka & McNeese, 2002)

8 R – 3/2       Problem Solving Experiment today

*Human Factors Analysis of Technology Assignment Due at 5pm today*

9 T – 3/7       SPRING BREAK!

9 R – 3/9       SPRING BREAK!


    Topic 2. Distributed-Embedded Cognition/Dr. McNeese

    Topic 3. Cognitive Technologies/Dr. McNeese

    - Virtual Environments
    - Artificial Intelligence and Agency
    - Affective Computing

Readings are now complete

10 R – 3/16    Mid-Term Exam

11 T – 3/21   In-Class Work Day

    *Preparations for Dyad Presentations*

    *Proposals for Research Project Due at 5pm today*

11 R – 3/23   Catchup Day (tbd)
12 - T – 3/28 | Prominent People/Research of HF/HCD

*Dyad Presentations – Teams A, B, C, D*

12 - R – 3/30 | Prominent People/Research of HF/HCD

*Dyad Presentations – Teams E, F, G, H*

**Review of Current Event using Human Factors Due at 5pm today**

13 - R – 4/4 | Prominent People/Research of HF/HCD

*Dyad Presentations – Teams I, J, K, L*

13 - R – 4/6 | Catchup Day (Tbd)

14 - T – 4/11 | Prominent People/Research of HF/HCD

*Dyad Presentations – Teams M, N, O, P*

14 - R – 4/13 | Prominent People/Research of HF/HCD

*Dyad Presentations – Teams Q, R, S, T*

15 - T – 4/18 | Prominent People/Research of HF/HCD

*Dyad Presentations – Teams U, V, W, X*

15 - R – 4/20 | In-Class Consulting and Work Day

LAST WEEK OF CLASSES
Course Requirements and Grading

Your overall grade is predicated on achieving a total possible 100 points. The course is divided up into individual and group work as defined below. For given assignments, particular rubrics will be produced so you know what my expectations are for the assignment and how they will be graded.

You will be responsible for the following individual assignments:

Individual Work (55 points)

- (15 points) Individual Review and Analysis Work

  o (5 points) One-Day Human Factors Journal- You will keep track of your interactions with things for an entire day. You will need to log every meaningful interaction and how it is related to human factors. Use your discretion on what you deem as meaningful. These interactions can represent good or bad human factors designs- please indicate why you think this in the paper. More information will be given later in the semester.

  o (5 points) Human Factors Analysis of a Technology- You will pick a technology (phone app, computer software, car user interface, etc.) and perform a human factors oriented analysis on the technology. This will consist of reviewing what the technology is, how it works, how it is designed, and then outlining specifically what is good and bad about the design of the technology from a human factors perspective. Based on your review of the technology, you will then identify and propose changes to the technology to make it more effective for the human.

  o (5 points) Review of Current Event- During the semester, you will identify a relevant current event and explain human factors importance to that event. More specifically, you outline how human factors impacts the current event and how human factors could potentially help to address the current event. More information will be given later in the semester.
• (25 points) **Mid-Term Exam** on the book chapters and lectures
  - this will occur after all the triad presentations on chapters have been completed

• (15 points) **Attendance / Participation** - Attendance will be taken randomly. It is worth 5 points total. Each class you miss results in a 5% reduction of these points. I will spot you 2 classes (ie, you have 2 classes that I provide immunity on). Of course you may legitimately miss a class with a Physicians or Professional’s excuse and can make up the work therein. However, being sick without a legitimate excuse will not provide you with makeup nor add to your attendance totals. **Participation** on in-class exercises (throughout the semester we will have exercises in the classroom to do) is worth 5 points.

**Dyad Work (35 points)**

• (10 points) **Review and Presentation of a Prominent Person in HCD** and their theory-frameworks-methods-applications
  - I will need to know your selection at the end of the 2nd week of the course so I can create a logical order of presentations
  - The Presentation should last 15 minutes (5 points)
  - We require a Review paper to be 10 pages max, double spaced, 50-50 split on writing (5 points). This paper will integrate all aspects of the prominent person you select and how their theory, research studies, methods, and applications are valuable to HF / HCD and how it has informed the world to make life better.
  - We will provide some in-class work activity time for planning and work on this assignment
  - I will provide you a list of prominent scholars you may choose from or you can make a suggestion to me and I will decide if it qualifies
  - We will begin these presentations in the 7th week, 3 per class.

• (25 points) **Research/Technology Project in Human Factors / HCD**

Your dyad will have 2 options to choose from as follows:

• **Research Proposal Paper (and Experiment)**

One of the goals of this course is to expose you to a strong research background in human-centered design. This option allows you to utilize the living laboratory framework to designate a specific problem state, conduct a literature review in accordance with the problem to comprehend what other researchers have found relative to the problem, by specifying a quantitative or qualitative methodological
approach and elaborating on what you think the outcomes may be. **If you can actually carryout the research to fruition, I will provide you with additional bonus points.**

**Requirements of Research Paper:**

1. Your paper should be predicated on a specific **challenge problem** for which HCD seemingly would provide a useful solution. [I would like you to utilize the Living Lab Framework for this research paper overall.] Remember this is a course on diverse aspects of HCD so while you may freely choose a problem area it must be relevant for human factors research and applications.

2. The challenge problem should (1) point upward towards **theoretical perspectives** (2) also point downward to be relevant to a distinct **real world domain / field of practice**, with specification of the issues and constraints that makeup the challenge problem.

3. Points 1 and 2 should be supported by a **literature review section** wherein rationale, justification, prior research provides a **foundation** for how you want to address the problem, issues, challenges.

4. The paper should specify a given **methodological approach** in addressing the challenge problem you have selected. The paper should specify why the method is the right approach, how the method would be implemented, and any constraints on applying the method to the field of practice selected. Any justification of the method through prior literature should be provided.

5. Summarize a discussion section about what you believe the results of your research will be and why the study addresses the original challenge problem you specified with a given domain of practice.

- **State of the Art” Technology Analysis**

Your dyad will choose a form of technology that is considered “state of the art” (SOTA). Examples could include biometric devices, medical technology, human-agent interaction, virtual reality, wearable computers, intelligent home devices, affective intelligence, unmanned drones and human-robot interaction, and sports performance technology. You are not limited to these examples – in fact, we encourage you to be extremely creative for this project and consult the instructors for ideas. Think of your dyad as an actual workgroup in a company setting. Your team has been tasked to find the next best venture for the company to pursue. You are competing, however, with the other teams present in the class for a research contract. Using the Living Laboratory framework as a
guide, your team will produce a high-quality research proposal aimed at examining the selected SOTA technology. The goal of this project is to be able to apply everything you and your teammates have learned from class and other projects in a real-world problem setting.

Requirements of Technology Analysis

1. First your dyad will identify and define a problem within a real world application wherein human-centered design offers the potential to improve performance, reduce errors, or enhance the user experience. Your dyad will be required to produce (1) literature review surrounding what the state of the technology is for a given problem state, how previous technology has been used as a foundation and for human-centered design, and perhaps assess the value of different technologies in addressing the problem space. As part of the review you will need to describe the basis for why the technology is specifically human-centered in some depth.

2. The second part of the analysis involves – given what you have found in the above review – designing a new technology that assuages the problem space you have selected. This part of the analysis involves innovation and how you would go about developing this new technology to again address the human-centered aspects of the project. As part of the design you would need to establish how you would test and evaluate the design to ensure its appropriateness to human factors.

The following applies to either option:

- **Proposal Plan** - (5 points)
  - (this will be provided around 6 weeks prior to project due date)
    - We will provide feedback on your proposal and meet with you.

- **Final Report** (15 points)
  - (50-50 writing assignment – ie, define for me who will write what) – this should roughly be 15-20 pages, 1.5” spacing, 1.25” borders, 12 pt Times New Roman font.

- **Work Breakdown Structure/Contract** - (5 points)
  - This will be 1 page from each person and will contain a contract that each of you have approved which will be reviewed by the TA, a work breakdown structure on who will do what work (1 page max)
  - At the end of your project you will be required to do a summary of your partner as to how well they fulfilled the work breakdown structure and contract (1 page max.)
Triad Work (10 points)

- **(10 points) Chapter Presentation** — three students present a 20-minute review presentation of a given book chapter
  - the presentation should have representative content but be creative as well
    - use class exercises, demonstrations, web videos to the extent they help communicate what the chapter is about
    - We will focus on chapter presentations for the first 6-7 weeks of the course, we will do 3 presentations per week divided as apropos across Tuesday and Thursday classes.

Summary of Grading (100 points possible)

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<tr>
<th>Work</th>
<th>Points</th>
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<tbody>
<tr>
<td>Individual</td>
<td>55</td>
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<tr>
<td>Dyad</td>
<td>35</td>
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<tr>
<td>Triad</td>
<td>10</td>
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Course Grading Scale

We will use the following Grading Scale for all activities. The final Grade will be determined using this grading scale

- A 95
- A- 90
- B+ 88
- B 85
- B- 80
- C+ 77
Standard rules of rounding apply, so .5 and above will be rounded up to the next whole number.

WHAT ARE MY RESPONSIBILITIES AS YOUR STUDENT?

Course Policies

Classroom Behavior and Technology Usage

In order for the course to be a mutually beneficial learning experience, it is pertinent that you be present, attentive, committed to being engaged and engaging, and respectful while in class. This means, amongst other things, that inappropriate use of computers and mobile devices (e.g. twitter, facebook, gaming or other irrelevant apps, surfing the web for non-class related content, etc.), cell phone usage, random conversation while your peers or the instructor is speaking, sleeping and related behaviors should not occur. These behaviors are distracting for both the instructor and your peers and detract from the learning experience.

Late Work and Absences

Unexcused, late papers and class-based exercises will not be accepted after the fact. If you have a legitimate excuse provided to me in advance, and the assignment can be made up within a week, then I will consider makeups on a case-by-case basis. If possible I will have a face-to-face conversation with you wherein we will discuss implications of your absence. If this procedure does not happen, then assignments may not be available for makeup. Only in very special circumstances, will makeups be allowed after 1 week from due date. Reductions in grades may apply for late papers as well (e.g., 20% reduction in grade). Notice that absences are to be handled in accordance with The Pennsylvania State University policy http://undergrad.psu.edu/aappm/E-11-class-attendance.html.

IS THERE ANYTHING ELSE I SHOULD KNOW?

4 Key Tips for Class Success
1. **Use all of your resources!** Remember that I am not only the instructor, but that I am a resource available to you. I encourage you to utilize my office hours as they are available to you as an extension of the classroom. You may use them to better understand a subject matter discussed, ask any questions you might have, get help with your assignments and the like. If you are not enjoying the class or feel you are not learning, please do not hesitate to bring this to my attention. My goal is for you to leave me class with a different mentality than you entered with.

2. **Come to each class prepared** (i.e. with the material read, assignments completed, and questions), ready to think critically about the issues presented and actively participate in the discussions. This will ensure that (1) your learning experience will be enhanced, (2) I know who you are, and (3) I know you are putting unquestionable effort into the class.

3. Learning does not end once you leave the classroom. Keep your eyes open and your mind alert! **Look for ways that the class content relates to your everyday life** and bring these experiences back with you into the classroom.

4. **Effort - do not procrastinate -**, as you can fall behind quickly in assignments and problems for this class. The class is designed to distribute the workload across the semester. Therein, assignments are due quickly. Waiting until the last minute typically results in poor quality work, so try your best to keep up and create a time budget and plan for the class.

**ACADEMIC INTEGRITY**

According to the Penn State Principles and University Code of Conduct: Academic integrity is a basic guiding principle for all academic activity at Penn State University, allowing the pursuit of scholarly activity in an open, honest, and responsible manner. In according with the University's Code of Conduct, you must not engage in or tolerate academic dishonesty. This includes, but is not limited to cheating, plagiarism, fabrication of information or citations, facilitating acts of academic dishonesty by others, unauthorized possession of examinations, submitting work of another person, or work previously used without informing the instructor, or tampering with the academic work of other students. Any violation of academic integrity will be investigated, and where warranted, punitive action will be taken. For every incident when a penalty of any kind is assessed, a report must be filed.

**Plagiarism (Cheating):** Talking over your ideas and getting comments on your writing from friends are NOT examples of plagiarism. Taking someone else's words (published or not) and calling them your own IS plagiarism. Plagiarism has dire consequences, including flunking the paper in question, flunking the course, and university disciplinary action, depending on the circumstances of the offense. The simplest way to avoid plagiarism is to document the sources of your information carefully. Plagiarism programs such as “Turn-it-In” may be used to check assignments.

**DISABILITY ACCESS STATEMENT**

**Americans with Disabilities Act:** The College of Information Sciences and Technology welcomes persons with disabilities to all of its classes, programs, and events. If you need accommodations, or have questions about access to buildings where IST activities are held, please contact us in advance of your participation or visit. If you need assistance during a class, program, or event, please contact the member of our staff or faculty in charge. Access to IST courses should be arranged by contacting the Office of Human Resources, 332 IST Building: (814) 865-8949.
Students with Disabilities: It is Penn State’s policy to not discriminate against qualified students with documented disabilities in its educational programs. (You may refer to the Nondiscrimination Policy in the Student Guide to University Policies and Rules.) If you have a disability-related need for reasonable academic adjustments in this course, contact the Office for Disability Services (ODS) at 814-863-1807 (V/TTY). For further information regarding ODS, please visit the Office for Disability Services Web site at http://equity.psu.edu/ods/.

In order to receive consideration for course accommodations, you must contact ODS and provide documentation (see documentation guidelines at http://equity.psu.edu/ods/guidelines/documentation-guidelines). If the documentation supports the need for academic adjustments, ODS will provide a letter identifying appropriate academic adjustments. Please share this letter and discuss the adjustments with your instructor as early in the course as possible. You must contact ODS and request academic adjustment letters at the beginning of each semester.

STATEMENT ON NONDISCRIMINATION & HARASSMENT (POLICY AD42)

The Pennsylvania State University is committed to the policy that all persons shall have equal access to programs, facilities, admission and employment without regard to personal characteristics not related to ability, performance, or qualifications as determined by University policy or by state or federal authorities. It is the policy of the University to maintain an academic and work environment free of discrimination, including harassment. The Pennsylvania State University prohibits discrimination and harassment against any person because of age, ancestry, color, disability or handicap, national origin, race, religious creed, sex, sexual orientation, gender identity or veteran status. Discrimination or harassment against faculty, staff or students will not be tolerated at The Pennsylvania State University. You may direct inquiries to the Office of Multicultural Affairs, 332 Information Sciences and Technology Building, University Park, PA 16802; Tel 814-865-0077 or to the Office of Affirmative Action, 328 Boucke Building, University Park, PA 16802-5901; Tel 814-865-4700/V, 814-863-1150/TTY.

For reference to the full policy (Policy AD42: Statement on Nondiscrimination and Harassment):

http://guru.psu.edu/policies/AD42.html (Links to an external site.)