URBAN DESIGN AND PRESERVATION DIVISION

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- Member Project Grants
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Wednesday November 18th

Best Practices for Producing Plans, Guidelines & Reports

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The Urban Design & Preservation Division of the APA presents:

**Best Practices for Producing Plans, Guidelines & Reports**

**WEBINAR – NOVEMBER 18, 2015**

**Stephanie Grigsby PLA, AICP, LEED GA**
Principal

*Design Workshop*
Types of Documents

- Academic
- Technical
  - Master Plans
  - Guidelines
  - Strategic Plans
  - Corridor Plans
- Visioning
- Marketing
Producing Guidelines and Plans

DW Legacy Design® Process

INITIATION
- Strategic Kick Off Meeting
- Project Management Plan
- Stakeholder Engagement Strategy

DIRECTION-SETTING
- Dilemma & Thesis
- Risk Analysis
- Critical Success Factors

METRICS
- Baselines
- Goals
- Metrics
- Benchmarks
- Strategies

ALTERNATIVE CREATION

PLAN REFINEMENT
- Testing Alternatives
- Evidence
- Preferred Alternative

IMPLEMENTATION
- Proof
- Measurement
- Project Performance
# Post Mortem Financial Analysis 2010-2013

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<th>AVERAGES</th>
<th>COMMUNITY PLAN</th>
<th>CORRIDOR PLAN</th>
<th>DESIGN GUIDELINES</th>
<th>PARKS + RECREATION</th>
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Analysis Capture

**DO**
- Develop TOC, Determine Exhibits
  - Create
  - Review
  - Revise
  - Review
  - Revise
  - Quality Review
  - Produce Final Document
  - Deliver to Client

**DON'T**
- Develop TOC, Determine Exhibits
  - Create
  - Review
  - Revise
  - Review
  - Revise
  - Review
  - Revise
  - Review
  - Revise
  - Produce Final Document
  - Deliver to Client
## Document Production Process

<table>
<thead>
<tr>
<th>SCOPING</th>
<th>DOCUMENT PLANNING</th>
<th>FILE SETUP &amp; MANAGEMENT</th>
<th>DRAFT PRODUCTION</th>
<th>PRINTING &amp; DELIVERY</th>
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<tbody>
<tr>
<td><strong>BEGIN</strong> with sleuthing during proposal development</td>
<td>- Develop TOC - Determine Exhibits - Storyboard</td>
<td>- Narrative Text - Photography - Illustrative Plans - Diagrams - CAD Linework - Section Renderings - 3D Renderings</td>
<td>Review</td>
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<tr>
<td><strong>DESCRIPTION</strong></td>
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<td><strong>CONTENT CREATION &amp; COLLECTION</strong></td>
<td><strong>REVIEW</strong></td>
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<tr>
<td>- Budget &amp; Schedule - Main Deliverables - Roles &amp; Responsibilities - Comparable Projects - Decision Makers - Specific Exclusions - Client Vision - Critical Success Factors - Dilemma &amp; Thesis - Selected Metrics</td>
<td></td>
<td><strong>REVISE</strong></td>
<td><strong>REVISE</strong></td>
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</table>

**Final Document**
Scoping the Document

- Budget & Schedule
- Main Deliverables
- Roles & Responsibilities
- Comparable Projects
- Review Cycles
- Decision Makers
- Specific Exclusions

Client Vision
Critical Success Factors
Dilemma & Thesis
Selected Metrics
Tips for Identifying Scope

- Identify available fees and expected budget
- Determine if there is a “model” or a comparable project
- Identify the main deliverables
- Identify the general schedule
- Ask questions about other project processes and deliverables
- Define items that are not in the scope
- Identify roles and responsibilities
- Understand if the final document should be basic, tailored or custom
- Develop a phased scope
- Identify how public comments will be addressed
- Capture lessons learned from each project
Document Planning

Document Production Process

**SCOPING**
- Budget & Schedule
- Main Deliverables
- Roles & Responsibilities
- Comparable Projects
- Decision Makers
- Specific Exclusions
- Client Vision
- Critical Success Factors
- Dilemma & Thesis
- Selected Metrics

**DOCUMENT PLANNING**
- Develop TOC
- Determine Exhibits
- Storyboard

**FILE SETUP & MANAGEMENT**
- Narrative Text
- Photography
- Illustrative Plans
- Diagrams
- CAD Linework
- Section Renderings
- 3D Renderings

**DRAFT PRODUCTION**
- Document Layout & Production

**PRINTING & DELIVERY**
- Final Document

 Begins with sleuthing during proposal development

[Diagram showing the flow from scoping to document planning, file setup, draft production, and printing & delivery, with arrows indicating review and revise steps.]
Step 1: Create a Table of Contents in Microsoft Word

Table of Contents: The First 100 Days Report

1. Introduction
   a. Executive Summary
   b. Vision and Values
   c. Strategic Plan

2. Mission and Goals
   a. Vision
   b. Core Values
   c. Strategic Plan

3. Business Strategy
   a. Marketing
   b. Operations
   c. Financial Planning

4. Implementation Plan
   a. Communication Plan
   b. Resource Allocation
   c. Project Timeline

5. Conclusion
   a. Summary
   b. Recommendations

---

Step 2: Layout the Table of Contents on each page by Chapter, Heading and Subheading

Step 3: Generate a Table of Contents in InDesign from the page layout and Paragraph Styles settings.

---

Figure 6: The example illustrates how to transfer the Table of Contents created in Word into an InDesign layout by page and then automatically generate a Table of Contents in InDesign.
H-GAC Sustainability Case Study: Urban Houston Framework

Style Guide

Purpose: This serves as clarification to the client and team members as to the style that all documents will be written.

Official Style Guide:
The Associated Press Stylebook and Briefing on Media Law 2011.

Additional style clarity:

Punctuation of Bulleted Lists:
1. In the case where bullets complete a sentence, bullets are really just acting as a graphic convention for breaking down long sentences. In a strictly technical document, bullets would just be avoided and the text would be written (and punctuated) as a sentence. In the type of documents we write (user-friendly...made for public consumption), it helps to break up long sentences with bullets thereby giving a hierarchy to the text. In this instance, they should be punctuated in the same manner as the sentence would have been with consistent use of a comma (or semi colon) after each phrase and a period after the last.
2. In the case where bullets are not completing a sentence, bullets are really just providing information or a menu. An example would be a table of contents or a plant list. If the menu is just a collection of phrases (not complete sentences) like a table of contents, we would not punctuate.
3. In the case where bullets contain one or more complete sentences (such as this bulleted list), punctuate completely.

Captions:
1. Always a complete sentence
2. Include source information
3. Preferably include the location (and date) the photo was taken

Figures (title for maps, title for tables, etc.):
1. Typically a phrase: not a complete sentence
2. Capitalize all words (except “and,” “or,” “a,” etc.)
3. Always include source information
4. Make sure that they include correct north arrows, scales and other graphic conventions as necessary
5. Bold and blue all figures, maps, and tables. Also, include their name unless you have on previous pages.

No page numbers for any of the tables, figures and maps in the text when used as a reference. By naming them, they can go to the list of figures and find it. (make sure we have a list of figures “City” vs. “city”):
   - In the case where the word is referencing the organization acting as the city’s government, the word “city” should always be capitalized. (Example: The City has several economic development programs in place.)
   - In the case where the word is referencing the geographic area of the city, the word “city” should never be capitalized. (Example: The creeks in the city provide an opportunity for a connected greenbelt.)

H-GAC Sustainability Case Study: Urban Houston Framework

- In the case where the word is referencing the geographic area of the city, the word “city” should never be capitalized. (Example: The creeks in the city provide an opportunity for a connected greenbelt.)
- In the case where the word “city” is part of the official name of place, it is always capitalized. (Example: New York City has several significant park spaces that contribute to the quality of life of residents.)

Commas
1. Use commas to separate elements in a series, but do not put a comma before the conjunction in a simple series (The flag is red, white and blue. He would nominate Tom, Dick or Harry).
2. Put a comma before the concluding conjunction in a series, however, if an integral element of the series requires a conjunction (I had orange juice, toast, and ham and eggs for breakfast.)
3. Use a comma also before the concluding conjunction in a complex series of phrases (The main points to consider are whether the athletes are skillful enough to compete, whether they have the stamina to endure the training, and whether they have the proper mental attitude.)

Additional style clarity:

Capitalization
1. Governmental Bodies (including “state,” “region,” “department,” “neighborhood,” etc.)
   - Capitalize the full and proper names of governmental agencies, departments and offices. (Example: The Nebraska State Senate, the U.S. Department of State, etc.)
   - All words that are capitalized when part of a proper name should be lowercased when they do not refer to a specific, existing body or are, instead, referring to a geographic area. (Example: The town does not have a fire department. The bill requires city councils to provide matching funds.)
2. “City”
   - In the case where the word is referencing the organization acting as the city’s government, the word “city” should always be capitalized. (Example: The City has several economic development programs in place.)
   - In the case where the word is referencing the geographic area of the city, the word “city” should never be capitalized. (Example: The creeks in the city provide an opportunity for a connected greenbelt.)
   - In the case where the word “city” is part of the official name of place, it is always capitalized. (Example: New York City has several significant park spaces that contribute to the quality of life of residents.)
3. “Park,” “Corridor,” “Greenway,” “Community,” etc.
   - Capitalize when part of a full and proper name or when used in reference to a full or proper name. (Example: The Lafayette Greenway, the Greenway, Central Park)
   - All words that are capitalized when part of a proper name should be lowercased when they do not refer to a specific, existing body. (The town is divided into seven neighborhoods. Each has two parks.)

Street Names
1. Always use an abbreviation for north “N.” or “S.”
2. Always spell out entire street name including words such as Avenue, Street, Boulevard.

Commas

## Attachment B: Document Standards for Central Wimberley Master Plan

Document Standards for the Central Wimberley Master Plan will be reviewed and approved during Client Kick-Off. According to the contract, revisions to these Standards may at the discretion of DW require an amendment to the contract.

### File Management

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<td>Plastic spiral coil bound</td>
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<td>Full bleed front and rear covers</td>
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<td>Presentations, Memos and Meeting Records: Microsoft Office</td>
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### Content Creation

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<td>Project Goals and Background for Website</td>
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<td>Baseline Assessment Memorandum (not to exceed 5-10 pages)</td>
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<td>Matrix of Alternative Funding Mechanisms</td>
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<td>Master Plan Document (not to exceed 30-60 pages)</td>
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<td>Existing Conditions Charts/Graphs/Exhibits (up to 5)</td>
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<td>Development Opportunity Map (1)</td>
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<td>Hand Drawn Master Plan Alternatives (up to 3)</td>
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### Table of Contents

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<th>3) Vision for Central Wimberley</th>
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Best Practices

- Determine whether the document is academic, technical, visioning or marketing in nature
- Determine the audience
- Confirm if the document is to be adopted by City Council or another governing body
- Determine content
- Consider what graphics will be stock versus custom
- Assign who will be creating the content (graphics, text, project book formatting)
- Create a production schedule
- Determine how subsequent copies are to be printed and by whom
- Confirm if the document will be available for digital download
- Review and confirm all aspects of production during the SKO
FILE SETUP & MANAGEMENT
CONTENT CREATION & COLLECTION

Narrative Text
Photography
Illustrative Plan, Diagrams
CAD Linework
Section Renderings, 3D Renderings

If possible, cycle narrative text more than once in Microsoft Word before placing into the document.

Cycle each exhibit through at least one round of revisions before placing into the document.
Unparalleled popularity, unprecedented collaboration

SR 28, a two-lane, mountainside road, is the only access route for over one million recreating visitors and 2.6 million vehicles per year. The plan establishes coordinated solutions that provide adequate access with fewer cars and improved user experience.

2.6 million+ vehicles impact Tahoe’s longest undeveloped shoreline

1+ million users visit the beaches and trails, and recreation sites are reaching their capacity for maintaining high user satisfaction

SR 28 Corridor Management Plan
## Analysis Capture

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</tbody>
</table>
Tahoe Transportation District
Carl Hasty, District Manager
Sue Klekar, Division Administrator

Federal Highway Administration

Nevada Department of Transportation
Rudy Malfabon, P.E., Director

Nevada Highway Patrol
Sergeant Randy Jackson
Incline Village/Lake Tahoe

Carson City Regional Transportation Commission
John McKenna, Chair

County of Washoe
John Berkich, Interim County Manager

Washoe Tribe of Nevada and California
Darrel Cruz, Washoe Cultural Resource Department-Director, Tribal Historic Preservation Officer

Tahoe Regional Planning Agency
Joanne Marchetta, Executive Director

Tim Carlson, Presidential Appointee

U.S. Forest Service
Nancy J. Gibson, Forest Supervisor
Lake Tahoe Basin Management Unit

Nevada Division of State Parks
Dave Morrow, Administrator

State of Nevada, Division of State Lands
James R. Lawrence, Administrator and State Land Registrar

County of Douglas
Steve Mokrohisky, County Manager

Incline Village General Improvement District
William B. Horn, General Manager

13 agencies, one effort
Analysis Capture

![Graph showing noise levels and decibel levels]

- **1994** Walkability Score: 48
- **2012** Walkability Score: 82
- **Target** Walkability Score: 77

**Noise Levels**:
- **125 dB**: Pain
- **100 dB**: Truck on Opelika Road
- **75 dB**: Normal Conversation
- **50 dB**: 4 lanes of traffic on Opelika Road
- **25 dB**: Target level (60dB)
- **Whisper in quiet room**: 0 dB

**People's Level of Annoyance based on Decibel Level**

![Graph showing speed limits and actual speeds]

- **SPEED LIMIT 25**, **ACTUAL SPEED 34**
- **SPEED LIMIT 45**, **ACTUAL SPEED 46**
- **SPEED LIMIT 35**, **ACTUAL SPEED 38**
Progress Tracking and Assigned Roles

Purpose:

Section 1: Overview
(able to be pulled apart for marketing piece)  
Responsibility Lead (L)  
Assist (A)  
Review (R)  
Existing Content Source  
New Content Source & Plans being developed  
Date to TTD/PDT
Feb. 16/23 & July 25/Aug. 1

Introduction (A sense of why)  
Feb. 16/23

Background (what prompted the Management Plan)
- SG (L)
- CH (A)
- TTD (R)
- PDT (R)  
- East Shore Access Plan 2001  
- Coordinate with Carl  
Feb. 16/23

Corridor Limits/Influence Areas
(Rim to Water; organization into core areas (Crystal Bay, Incline Village, Scenic Designation Area))
- SG (L)
- DK (A)
- TTD (R)
- PDT (R)  
- USFS management plan  
- Bikeway Feasibility Study Maps  
- Factoids  
- Map to be developed  
- NDSP Gen.  
Feb. 16/23

How/When to Use the Plan
- SG (L)
- DK (A)
- TTD (R)
- PDT (R)

Purpose and Need
- KM (L)
- SG (A)
- TTD (R)
- PDT (R)

Vision for the Corridor
- KM (L)
- SG (A)
- TTD (R)
- PDT (R)
- Current Draft

Table of Contents Checklist

Purpose: The intent of this checklist is to ensure understanding on initial and final drafts and to gain client buy-in for deliverable dates.

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Section</th>
<th>Staff-ready Draft</th>
<th>Team Member</th>
<th>Client-ready Draft</th>
<th>Final Draft</th>
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Best Practices: Analysis Capture

- Ensure ALL team members use the style guide
- Draft content as it is created
- Summaries should build content aligned with the TOC
- Document all metrics/research methodologies
- Synthesize and manage large quantities of information
- Establish a hierarchy to keep readers’ attention
- Cite as you write
- Keep on track with a checklist: Harness the power of the checklist
Review and Editing

Review Cycles

- **INTERNAL**: 20%, 50%, 80%, 90%
- **EXTERNAL**: Magnitude of Changes

- **Review Separate Text and Exhibits**
- **Review Text and Exhibits in Document Layout**
- **Final Review**

*American Planning Association*

Making Great Communities Happen
Review and Editing

Describe the social/community impact of your design (≤ 100 words):

A total of 7,419 participants were engaged in the comprehensive park planning effort. That is over 60% of the entire population of Lafayette. The key to success was meeting the community where they already were aware of issues. In addition to 13 meetings and two online surveys, presentations were also held in schools and parks throughout the county. Community activation was enhanced through social media and email outreach, encouraging residents to take part in the process. Online and mobile media were also used to share updates.

Workshop attendees were also engaged in the process, and staff were present at the weekly Farm & Artisan Markets in order to spread the word about the project. Feedback was gathered from various stakeholders, and the community engaged in conversations about their needs and priorities. The development of a comprehensive plan was informed by the input of community members.

Purpose

The City of Wimberley retained Design Workshop, their associates, and affiliate firm Design and Architecture for the comprehensive plan for Wimberley. The City of Wimberley Master Plan is a strategic guide for the community, providing a framework for future growth and development. The plan focuses on areas such as transportation, infrastructure, and community facilities. It is intended to shape the physical, social, and economic future of the city.

Study Area Location

Wimberley is a small, rural town located in the heart of Central Texas Hill Country. It is situated between Austin and San Antonio, and serves as a gateway to the nearby Edwards Plateau. The city is known for its scenic beauty and outdoor recreation opportunities. The Master Plan outlines strategies for enhancing the city's assets and improving the quality of life for its residents and visitors.
# Review and Editing

## Chicago Style Proofreaders’ Marks

<table>
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<th>Operational Signs</th>
<th>Typographical Signs</th>
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</thead>
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<td>Delete</td>
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<tr>
<td>( \cyril )</td>
<td>Close up; delete space</td>
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<tr>
<td>( \text{shift} )</td>
<td>Make space between words equal</td>
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<td>( \text{alt} )</td>
<td>Let it stand</td>
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<td>( \text{eq} )</td>
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<td>( \text{alt} )</td>
<td>Spell out</td>
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## AP Style Proofreaders’ Marks

- Atlanta (AP): The organization
- said Thursday
- the last attempt
- With this the president tried
- the board company is not
- over a period of more years
- there were on the group
- Aka, Oklahoma is the hometown
- The man was the guest of
- prince Edward said it was the
- as a result this will be
- the computer pointed to them
- it is necessary
- the order for the work is
- The ruling is an example
- according to the source

- **BF** By DONALD AMES
- J.R. Thomas
- **BF** J.R. Thomas
- insert comma
- insert apostrophe
- insert quotation marks
# Central Wimberley Master Plan Comment Log

**Purpose:** The goal of the comment log is to quickly communicate how Design Workshop and the consultant team works to address each comment or requested revision. The intent is to keep the client, client team, project team, stakeholders and others on the same page as to requested changes and/or revisions. Consistent use of a comment log to track and respond to comments during a project’s duration helps to facilitate client communication and fosters the resolution of questions prior to document changes.

<table>
<thead>
<tr>
<th>Date</th>
<th>Document Title/Version</th>
<th>Commeneter</th>
<th>Page</th>
<th>Comment</th>
<th>DW Action</th>
<th>Status</th>
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<tr>
<td>5/20/2014</td>
<td>Meeting Record – Bi-Weekly Conference Call</td>
<td>City Administrator</td>
<td>39</td>
<td>Text of report should mention “subsequent meetings were held with parties that approached the City to express and discuss further community concerns”.</td>
<td>DW added the following text to page 39: “Subsequent meetings were held with parties that approached the City to express and discuss further community concerns for Central Wimberley.” Now on page 29.</td>
<td>Complete</td>
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<tr>
<td>5/20/2014</td>
<td>Meeting Record – Bi-Weekly Conference Call</td>
<td>City Administrator</td>
<td>61</td>
<td>Add note regarding addressing requests for additional creek crossings.</td>
<td>DW added the following text in recommendations chapter page 61: Connectivity Recommendations “Future trail connections and development may require improved creek crossings for pedestrians and cyclists. Requests for additional creek crossings should be carefully reviewed by the City to ensure connectivity needs within and beyond the Central Wimberley study area are being met.” Now on page 51.</td>
<td>Complete</td>
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<tr>
<td>5/20/2014</td>
<td>Meeting Record – Bi-Weekly Conference Call</td>
<td>City Administrator</td>
<td></td>
<td>“…City shall establish a buffering standard.”</td>
<td>DW needs further clarification from Client regarding revision needed.</td>
<td>Pending</td>
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</table>
Best Practices: Review and Editing

- Confirm who reviews and the purpose of the review
- Confirm how comments are consolidated
- Determine how to address conflicting comments
- Document when decisions are made (Decision Log)
Managing Change

- Periodically review scope – with the TOC checklist
- Provide solutions when discussing out-of-scope items
- Be forward thinking – look ahead to the next deliverables
- Utilize a weekly to-do list and decision log
- Immediately address changes in decision-making team
Writing Resources

- Technical Writing 101: A Real-World Guide to Planning and Writing Technical Content
- The Mayfield Handbook of Technical and Scientific Writing.
- The Associated Press Stylebook and Briefing on Media Law
- The Transitive Vampire: A Handbook of Grammar for the Innocent, the Eager, and the Doomed
- A Writer’s Coach: The Complete Guide to Writing Strategies that Work
- The Associated Press Guide to Internet Research and Reporting
Contact Information:
Stephanie Grigsby
sgrigsby@designworkshop.com