Best Practices

For the Production of Recreation and Management Planning Documents

June 30, 2016
Today’s Presenter

Stephanie Grigsby
- Principal
- Design Workshop
- Registered Landscape Architect
- AICP Certified Planner
Learning Objectives

1. Identify how to establish project expectations and deliver complex planning work.

2. Learn best practices to reduce scheduling and budget delays.

3. Improve ability to capture analysis, process and design and management recommendations in the written form.

4. Learn how to navigate the review and editing process.
Best Practices for the Production of Recreation Plans & Guidelines
Types of Documents

• Academic
• Technical
  • Recreation Plans
  • Master Plans
  • Guidelines
  • Strategic Plans
  • Corridor Plans
• Visioning
• Marketing

2015 Outstanding Comprehensive Plan Honor Award
ADAMS COUNTY
OPEN SPACE, PARKS &
TRAILS MASTER PLAN
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

<table>
<thead>
<tr>
<th></th>
<th>Community Plan</th>
<th>Corridor Plan</th>
<th>Design Guidelines</th>
<th>Parks + Recreation</th>
<th>Urban Design</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Averages</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pages</td>
<td>128</td>
<td>192</td>
<td>482</td>
<td>130</td>
<td>163</td>
</tr>
<tr>
<td>Cost per page</td>
<td>$2,156</td>
<td>$1,984</td>
<td>$1,036</td>
<td>$5,841</td>
<td>$1,683</td>
</tr>
<tr>
<td>Internal review cycles</td>
<td>9</td>
<td>8</td>
<td>5</td>
<td>9</td>
<td>4</td>
</tr>
<tr>
<td>External review cycles</td>
<td>6</td>
<td>6</td>
<td>5</td>
<td>9</td>
<td>2</td>
</tr>
<tr>
<td>Duration (months)</td>
<td>19</td>
<td>16</td>
<td>10</td>
<td>26</td>
<td>8</td>
</tr>
<tr>
<td>Metrics</td>
<td>6</td>
<td>24</td>
<td>0</td>
<td>29</td>
<td>11</td>
</tr>
<tr>
<td>Diagrams</td>
<td>14</td>
<td>55</td>
<td>68</td>
<td>49</td>
<td>36</td>
</tr>
<tr>
<td>Renderings</td>
<td>5</td>
<td>28</td>
<td>61</td>
<td>16</td>
<td>3</td>
</tr>
</tbody>
</table>
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

**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
Scoping the Document

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

- Identify available fees and expected budget
- Identify “model” or comparable projects
- Identify the main deliverables
- Identify the general schedule
- Ask questions about other projects and deliverables
- Define items that are not in the scope
- Identify roles and responsibilities
- Understand if it 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
Document Planning

Step 1: Create a Table of Contents in Microsoft Word

- Table of Contents: The Basic Outline Setup
  - Introduction
  - Methodology
  - Data Analysis
  - Discussion
  - Conclusion

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

- Community Engagement Process
  - Workshop 1
  - Workshop 2
  - Workshop 3

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.
Document Planning

Storyboard → Final Project Book

Storyboard → Final Project Book
H-GAC Sustainability Case Study: Urban Houston Framework

Style Guide

Purpose: This serves as clarification to the clients and team members on 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 part 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 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 “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 lowercase when they do not refer to a specific existing body or area, 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 Laffite Greenway, the Greenway, Central Park)
   - All words that are capitalized when part of a proper name should be lowercase 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 written approval by the client.

### Table of Contents

1. **Project Background**
   - Development history
   - Demographic trends
   - Economic trends
   - Pertinent local and state plans

2. **Existing Conditions**
   - Market Assessment
     - Future Demand by Land Use
       - Retail
       - Restaurant
       - Residential
       - Office
       - Entertainment
       - Civic
   - Physical Assessment
     - Land Use and Development Patterns
     - Thoroughfare and Pedestrian Linkages
     - Accessibility
     - Streetscape and Parking
     - Infrastructure
   - Financial Assessment
     - Funding Mechanisms
     - Public/private Partnerships

3. **Vision for Central Wimberley**
   - Community Engagement
     - Overview of Outreach
   - Master Plan Alternatives
     - Alternative 1
     - Alternative 2
     - Alternative 3

4. **Recommendations**
   - Preferred Master Plan Alternative
   - Implementation Matrix

### File Management

<table>
<thead>
<tr>
<th>Layout</th>
<th>ACKNOWLEDGED BY CLIENT:</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.5x11, color</td>
<td>Initiates:</td>
</tr>
<tr>
<td>Up to 30-50 pages in length</td>
<td>Date:</td>
</tr>
<tr>
<td>Plastic spiral coil bound</td>
<td></td>
</tr>
<tr>
<td>Full bleed front and rear covers</td>
<td></td>
</tr>
<tr>
<td>Up to 1 inch margin interior pages</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Software</th>
<th>ACKNOWLEDGED BY CLIENT:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visual Renderings: Adobe Creative Suite 6</td>
<td>Initiates:</td>
</tr>
<tr>
<td>Master Plan Document: Adobe Creative Suite 6</td>
<td>Date:</td>
</tr>
<tr>
<td>Presentations, Memos and Meeting Records: Microsoft Office</td>
<td></td>
</tr>
<tr>
<td>Existing Conditions Analysis: ESRI ArcGIS</td>
<td></td>
</tr>
</tbody>
</table>

### Content Creation

<table>
<thead>
<tr>
<th>Narrative</th>
<th>ACKNOWLEDGED BY CLIENT:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stakeholder Engagement Strategy</td>
<td>Initiates:</td>
</tr>
<tr>
<td>Project Goals and Background for Website</td>
<td>Date:</td>
</tr>
<tr>
<td>Baseline Assessment Memorandum (not to exceed 5-10 pages)</td>
<td></td>
</tr>
<tr>
<td>Market Assessment Memorandum (not to exceed 5-10 pages)</td>
<td></td>
</tr>
<tr>
<td>Physical Assessment Memorandum</td>
<td></td>
</tr>
<tr>
<td>Matrix of Alternative Funding Mechanisms</td>
<td></td>
</tr>
<tr>
<td>Master Plan Document (not to exceed 30-50 pages)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Text</th>
<th>ACKNOWLEDGED BY CLIENT:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing Conditions Photographic Documentation</td>
<td>Initiates:</td>
</tr>
<tr>
<td>Regional Overview Exhibit (1)</td>
<td>Date:</td>
</tr>
<tr>
<td>Project Boundary Exhibit (1)</td>
<td></td>
</tr>
<tr>
<td>Existing Conditions Charts/Graphs/Exhibits (up to 5)</td>
<td></td>
</tr>
<tr>
<td>Development Opportunity Map (1)</td>
<td></td>
</tr>
<tr>
<td>Vision Charrette Presentation (1)</td>
<td></td>
</tr>
<tr>
<td>Hand Drawn Master Plan Alternatives (up to 3)</td>
<td></td>
</tr>
<tr>
<td>Refined Digital Master Plan (1)</td>
<td></td>
</tr>
<tr>
<td>Photographs of Vision Charrette</td>
<td></td>
</tr>
<tr>
<td>Final Document Presentation (1)</td>
<td></td>
</tr>
</tbody>
</table>

### Draft Production

<table>
<thead>
<tr>
<th>Review and editing cycles</th>
<th>ACKNOWLEDGED BY CLIENT:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to three (3) Client reviews/editing cycles</td>
<td>Initiates:</td>
</tr>
<tr>
<td>Ten (10) days after receipt of draft to request revisions</td>
<td>Date:</td>
</tr>
<tr>
<td>DW to provide Client a Comment Log</td>
<td></td>
</tr>
<tr>
<td>Client responsible for compiling City comments</td>
<td></td>
</tr>
<tr>
<td>DW responsible for compiling public comments</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Printing and Delivery</th>
<th>ACKNOWLEDGED BY CLIENT:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft document: PDF format</td>
<td>Initiates:</td>
</tr>
<tr>
<td>Final document: PDF format</td>
<td>Date:</td>
</tr>
</tbody>
</table>
Best Practices: Document Planning

• Determine whether the document is academic, technical, visioning or marketing in nature
• Determine the audience
• Confirm if it will be adopted by a 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 SKO
FILE SETUP & MANAGEMENT
CONTENT CREATION & COLLECTION

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

Cycle each exhibit through at least one round of revisions before placing into the document.

If possible, cycle narrative text more than once in Microsoft Word before placing into the document.
SR 28 Corridor Management Plan

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Adopt-a-Highway Program</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Backcountry designation</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Barriers and signage</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Barriers (Install)</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Bike facilities</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Bike friendliness – review drainage grades</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Bike lanes and wide shoulders – incorporate striping and regular maintenance into all projects</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Bike: Link parking with shared use path</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Bike racks</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Business/Private/Non-Profit partnerships</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Campgrounds and camping</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Corridor Management Plan revisions &amp; updates</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Emergency turnouts</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Equestrian recreation opportunities</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>FHWA &quot;experimental status&quot; to achieve desired benefits</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Funding programs and options</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Hidden Beach improvements</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Historic preservation</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Interpretive signage program</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Interpretive signage</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Litter management on beaches and trails</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Management</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Management: Acquire lands that resolve resource conflicts</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
SR 28 Corridor Management Plan

Tahoe Transportation District
Carl Hasty, District Manager
Sue Kekar, Division Administrator

Federal Highway Administration

Nevada Department of Transportation
Rudy Mathabon, 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 Barkich, Interim County Manager

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

Tahoe Regional Planning Agency
Joanna Marchetta, Executive Director

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 Mokrinsky, County Manager

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

13 agencies, one effort
SR 28 Corridor Management Plan
Analysis Capture

[Diagram showing walkability score with figures representing years 1994 and 2012, and a target figure.

[Diagram showing a noise level graph with decibels on the y-axis and different noise levels like 'pain', 'truck on Opelika Road', '4 lanes of traffic on Opelika Road', and 'whisper in quiet room'.

[Diagram showing people's level of annoyance based on decibel level.

[Map of SR 28 corridor with traffic speed limit and actual speed markers, including:
- Speed limit 25, actual speed 34
- Speed limit 45, actual speed 46
- Speed limit 35, actual speed 38]
SR 28 Corridor Management Plan

**Progress Tracking and Assigned Roles**

<table>
<thead>
<tr>
<th>Purpose:</th>
<th>Section I: Overview (able to be pulled apart for marketing piece)</th>
<th>Feb. 16/23 &amp; July 25/Aug. 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Responsibility</strong></td>
<td>Lead (L)</td>
<td>Existing Content Source &amp; Plans being developed</td>
</tr>
<tr>
<td><strong>Assistant (A)</strong></td>
<td>Review (R)</td>
<td>Coordinate with Carl</td>
</tr>
</tbody>
</table>

**Introduction (A sense of why)**

- Background (what prompted the Management Plan)
  - SG (L)
  - CH (A)
  - TTD (R)
  - PDT (R)
  - East Shore Access Plan 2001

- 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 Map
- Factoids

**Table of Contents Checklist**

<table>
<thead>
<tr>
<th>Purpose:</th>
<th>The intent of this checklist is to ensure understanding on initial and final drafts and to gain client buy-in for deliverable dates.</th>
</tr>
</thead>
</table>

<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>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Summary</td>
<td>N/A</td>
<td>To be produced by 12/14</td>
<td>SE</td>
<td>To be produced by 12/20</td>
<td>2/26</td>
</tr>
<tr>
<td>Purpose</td>
<td>Project Vision</td>
<td>To be produced by 11/15</td>
<td>SE</td>
<td>To be produced by 11/26</td>
<td>2/14</td>
</tr>
<tr>
<td></td>
<td>Project Goals</td>
<td>To be produced by 11/15</td>
<td>SE</td>
<td>To be produced by 11/26</td>
<td>2/14</td>
</tr>
<tr>
<td>Process</td>
<td>Project Approach</td>
<td>To be produced by 11/15</td>
<td>JY</td>
<td>To be produced by 11/26</td>
<td>2/14</td>
</tr>
<tr>
<td></td>
<td>Stakeholder Engagement</td>
<td>To be produced by 11/15</td>
<td>JY</td>
<td>To be produced by 11/26</td>
<td>2/14</td>
</tr>
<tr>
<td>Challenges and Opportunities</td>
<td>Content</td>
<td>To be produced by 12/14</td>
<td>SE</td>
<td>To be produced by 12/20</td>
<td>2/26</td>
</tr>
<tr>
<td></td>
<td>Needs Assessment</td>
<td>To be produced by 12/14</td>
<td>SE</td>
<td>To be produced by 12/20</td>
<td>2/26</td>
</tr>
<tr>
<td>Recommendations</td>
<td>Transportation</td>
<td>To be produced by 3/12</td>
<td>LSC-GS</td>
<td>To be produced by 3/20</td>
<td>3/28</td>
</tr>
<tr>
<td></td>
<td>Land Use</td>
<td>To be produced by 3/12</td>
<td>SE</td>
<td>To be produced by 3/20</td>
<td>3/28</td>
</tr>
<tr>
<td></td>
<td>Market Analysis</td>
<td>To be produced by 3/12</td>
<td>RCLCO-MD</td>
<td>To be produced by 3/20</td>
<td>3/28</td>
</tr>
<tr>
<td></td>
<td>Streetscape</td>
<td>To be produced by 3/12</td>
<td>AA</td>
<td>To be produced by 3/20</td>
<td>3/28</td>
</tr>
<tr>
<td></td>
<td>Utilities</td>
<td>To be produced by 3/12</td>
<td>To be produced by 3/20</td>
<td>3/28</td>
<td></td>
</tr>
</tbody>
</table>
Best Practices: Analysis Capture

• Ensure ALL team members use the style guide
• Draft content as it is created
• Summaries should build content aligned with 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%

MAGNITUDE OF CHANGES

EXTERNAL

50%

Review Separate Text and Exhibits

80%

Review Text and Exhibits in Document Layout

90%

Final Review

FINAL DELIVERY
Review and Editing

Describe the social/community impact of your design

A total of 7,419 participants were engaged in the comprehensive park planning effort. This is over 50% of the entire population of Lafayette.

The key to success was meeting the community where they already were. In addition to 13 meetings and 2 online surveys, presentations were also made throughout the community to local clubs.

Community members and non-profits were all invited to their favorite process. Online and social media were all utilized to their fullest extent, and staff were present at the weekly "Health and Arts" workshops in order to spread the word about the Health and Arts workshops.

Mailed letters went out about Lafayette and the region. A team of community volunteers went house to house to meet the community.

The most important feedback was received from the community groups and the direct input from the public. The incorporation of the feedback into the master plan tells the community how it can be involved in the future planning efforts (< 75 words).

Because this project was born from a grassroots effort to save a pristine area from commercial development, it was imperative that everyone was engaged and committed to the outcome.

The team reached out to citizens of Lafayette in creative ways. Events were held at the "Health and Arts" workshops and community centers to collect ideas from a wide audience and hand-on activities were used to actively engage citizens in the planning process.

Study Area Location

Wimberley is a small, rural town located in the heart of Central Texas Hill Country (see Figure 1). Wimberley, known for its natural beauty, offers a relaxed and outdoor-oriented lifestyle for residents, visitors, and tourists throughout the year. This makes Wimberley an ideal location for a master plan that includes a comprehensive park and trail system.

The Central Wimberley Master Plan includes the following key elements:

1. A new trail system
2. A nature education center
3. A community gathering place

Figure 1: Wimberley Regional Map

draft
Review and Editing

Chicago Style Proofreaders’ Marks

Typographical Signs:
- Set in italic type.
- Set in roman type.
- Set in boldface type.
- Set in lowercase.
- Get in capital letters.
- Get in small caps.
- Wrong font; set in correct type.
- Backspace type (erase) remove blemish.

Operational Signs:
- Delete.
- Close up; delete space.
- Delete and close up (use only when deleting letters within a word).
- Let it stand.
- Make space between words equal.
- Make space between lines equal.
- Insert hair space.
- Letterspace.
- Begin new paragraph.
- Insert type one em from left or right.
- Move right.
- Move left.
- Center.
- Move up.
- Move down.
- Flush left.
- Flush right.
- Straighten type; align horizontally.
- Align vertically.
- Transpose.
- Spell out.

Punctuation Marks:
- Insert comma.
- Insert apostrophe or single quotation marks.
- Insert quotation marks.
- Insert period.
- Insert question mark.
- Insert semicolon.
- Insert colon.
- Insert hyphen.
- Insert en dash.
- Insert en dash.
- Insert parentheses.

AP Style Proofreaders’ Marks

- Atlanta. (AP) The organization said Thursday its first.
- The last attempts.
- With this the president tried.
- The Jones-Smith company is not.
- Over a period of six or more years.
- There were in the group.
- Ada, Oklahoma, is the hometown.
- The Roman was the guest of.
- Prince Edward said it was his.
- As a result, this will be.
- The ad threaten pointed to them.
- Instead, it is necessary.
- The order for the laser devices.
- The ruling a fine example.
- According to the new source.
- By Donald Ames.
- J.R. Thomas.
- J.R. Thomas.

Boldface, center.
Flush right.
Flush left.
Insert comma.
Insert apostrophe.
Insert quotation marks.
Insert period.
Insert hyphen.
Insert dash.
## 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>Commenter</th>
<th>Page</th>
<th>Comment</th>
<th>DW Action</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<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 &quot;subsequent meetings were held with parties that approached the City to express and discuss further community concerns&quot;.</td>
<td>DW added the following text to page 39: &quot;Subsequent meetings were held with parties that approached the City to express and discuss further community concerns for Central Wimberley.&quot; Now on page 29.</td>
<td>Complete</td>
</tr>
<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>
</tr>
<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>
</tr>
</tbody>
</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.
• A Writer’s Reference. Fourth edition
• 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
Where to Find the Best Practices

• Design Workshop is working with American Planning Association (www.planning.org) to develop the Best Practices into a Planning Advisory Service (PAS) Report

• The PAS Report is anticipated to be finished fall of 2016 and should be released for public use by 2017
Questions?

Type your question in the QUESTION pane of the Control Panel.
Providing National Leadership and Services for Advancing the Outdoor Recreation Profession

2017 National Outdoor Recreation Conference
Scottsdale, Arizona – May 1 - 4, 2017

“Outdoor Recreation Planning” now available as an eBook, the bound edition will be available this summer at sagamorepub.com
Watch for a follow up email and survey about this webinar.

Check out the SORP website (www.RecPro.org) for more outdoor recreation technical resources.

Question on the presentation?
Contact Stephanie - SGrigsby@DesignWorkshop.com

Questions about SORP?
Contact Brenda Adams-Weyant – Brenda@RecPro.org