

# E-Book Project Proposal



## Executive Summary

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The Center for Plain Language (Center) is the leading voice on plain language in the United States. It provides tools, resources, information, checklists, and guidance to Federal, State and local government, private business and the public.

The Center connects with the world through its website ([www.centerforplainlanguage.org](http://www.centerforplainlanguage.org)), social media (Twitter and Face-book, primarily), e-mails to members, and through two yearly events: The ClearMark Awards and the Federal Plain Language Report Card.

The Center wants to develop a resource to help people and organizations start a Plain Language Program (PLP). The Center decided the best way to do this is to publish an electronic book (e-book) titled, *How to Start and Maintain a Plain Language Program Where You Work*.

Some organizations, such as the Federal Aviation Administration, the Internal Revenue Service, Aetna, United HealthCare, Healthwise, and Health and Human Services have existing PLPs that have led to significant improvement.

The intent of this proposal is to solidify the purpose and outline the process by which the Center can plan, develop, produce, and distribute this e-book successfully. This proposal contains the following key sections:

- **Statement of Objective:** Summarizes the project objective and goal, and states the relevance and importance of the issue
- **Project Plan/Approach:** Provides a high-level description of the steps involved in the process of publishing the e-book
- **Project Management:** Describes how the project will be managed, including a detailed timeline, project deliverables, project funds, interaction protocol with sponsor, and the project team
- **Special Topics:** Discusses topics that are not required to begin the project, but might be relevant for the Center to consider as the project moves forward

The Center can use this project proposal as a guiding document to set the precedence for future projects that are similar in scope and nature.

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## Statement of Objective

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People and organizations are looking to create Plain Language Programs. Currently, there are insufficient resources or standards available to help them create, implement, and maintain this type of program in their respective work environments.

The Center for Plain Language is a 501(c)(3), non-profit organization whose mission is to help government agencies and businesses communicate clearly. As a leading supporter of clear communication, the Center has decided to publish a professional electronic book (e-book) titled, *How to Start and Maintain a Plain Language Program Where You Work*.

This e-book would be the go-to resource for individuals and organizations interested in starting a program. Also, the e-book would further promote the Center as the foremost authority on clear communication for government and business.

The Center intends to have the e-book ready for release by May 10, 2016 to coincide with its annual ClearMark Awards event.

## Project Plan/Approach

The project plan, summarized in Table 1, lists the steps needed to develop, produce, and distribute the Center’s e-book to meet the distribution date (May 10, 2016). The sequence of these steps are illustrated more clearly in the [Timeline with Milestones](#) section.

*Table 1: Project Plan/Approach. A high-level look at the steps needed to develop, produce, and distribute the e-book.*








 <p><b>Review, finalize, and approve project proposal.</b></p>	<p>Submit e-book project proposal to the Center board for review and approval. The e-book project will start upon the Center board’s approval.</p>
 <p><b>Identify an industry-standard guideline.</b></p>	<p>Select an industry style guide to follow, and ensure all project team members have access to this resource. Also develop an in-house style guide that identifies any Center-specific style, formatting, tone, naming conventions, and abbreviations.</p>
 <p><b>Prepare assignments and schedule interviews.</b></p>	<p>The project team will collaborate to make assignments and schedule interviews. A list of the interview questions and proposed interviewees has been provided in <a href="#">Exhibit A – Interview Process</a>.</p>
 <p><b>Create e-book outline.</b></p>	<p>Prepare an outline of the various sections for the e-book and create a list of the topics that need to be covered. A preliminary outline has been provided in <a href="#">Exhibit B – Draft E-Book Outline</a>.</p>
 <p><b>Finalize and approve outline.</b></p>	<p>Outline will be distributed to the Center board to elicit comments, feedback, and approval.</p>
 <p><b>Develop content.</b></p>	<p>Each content editor will be responsible for developing content for his or her assigned sections. This includes developing the necessary content to summarize the outcome of the interviews conducted.</p>
 <p><b>Review and revisions.</b></p>	<p>All chapters or sections of the e-book will go through a series of reviews and revisions. The project team will collaborate with the Center board to determine the best approach to this process.</p>

Table 1: Project Plan/Approach. A high-level look at the steps needed to develop, produce, and distribute the e-book.

 <p><b>Finalize content and conduct a final edit.</b></p>	<p>After incorporating comments and feedback that come out of the review and revision phase, the project team will finalize the content and conduct a final edit.</p>
 <p><b>Finalize manuscript.</b></p>	<p>With all content finalized, the project team will pull together a finalized manuscript that can be given to the document designer to begin page layout.</p>
 <p><b>Page layout + cover design.</b></p>	<p>Page layout is performed on final manuscript. Cover design can begin as early as the content development stage.</p>

## Project Management

### Project Work Environment

**Project Management:** An effective platform for managing the Center’s e-book project is Basecamp. Using this platform will ensure all project team members have access to one central location to check on the project’s status. Basecamp’s unique blend of tools (e.g., chat, message board, to-do list, schedule, and automatic check-ins) allows the project team to stay on the same page about the e-book and all associated activities.

**E-Book Development:** In addition, a SharePoint 2013 site will be established as the primary platform for e-book development. One of the most powerful features of SharePoint is the ability to effectively store and manage documents, collaborate on them, and retain detailed version history (with the option to easily restore back to previous versions). SharePoint 2010 and 2013 provide the co-authoring functionality, which allows multiple users to collaborate on a single document, at the same time. Having this functionality will be a **significant benefit** to the team during the content development phase.

### Project Team

The e-book project will require a team of qualified management and editorial professionals who are familiar with industry standards for content development, editing, and document design. The ideal e-book project team consists of the roles identified in Table 1.

Table 2: The Center E-Book Project Team. The e-book project team consists of qualified management and editorial professionals.

Role/Title	Responsibilities	Proposed Team Member
<b>Executive</b>	<ul style="list-style-type: none"> <li>Serves as the project’s strategic compass and</li> </ul>	Donna M. Creason

Table 2: The Center E-Book Project Team. The e-book project team consists of qualified management and editorial professionals.

Role/Title	Responsibilities	Proposed Team Member
<b>Editor</b>	<p>ensures that editors and writers adhere to and uphold the e-book’s mission, vision, and voice</p> <ul style="list-style-type: none"> <li>Organizes, supervises, and participates in the management and development of all content submitted for incorporation into e-book</li> <li>Available to write content and help edit the e-book for grammar, punctuation, spelling, and style, as well as ethics breaches like plagiarism.</li> </ul>	
<b>Content Developer/ Editor<sup>1</sup></b>	<ul style="list-style-type: none"> <li>Responsible for all aspects of content, which includes planning, developing, reviewing, and revising content for publication.</li> <li>Rewrites content to make it easier for readers to understand</li> <li>Verifies facts using standard reference sources</li> </ul>	Brian Berkenstock Robin Kilroy Beth Landau Lisa Van Alstyne Lorna Lockert
<b>Proofreader</b>	<ul style="list-style-type: none"> <li>Reads content and correct for errors in spelling, punctuation, and grammar</li> </ul>	Rebecca Goulson
<b>Document Designer</b>	<ul style="list-style-type: none"> <li>Designs page layouts for the e-book</li> <li>Collects the text, graphics, and other materials they will need and format them into a finished product</li> <li>Establishes formatting properties, such as text size, column width, and spacing</li> <li>Positions artwork and text on the page layout</li> <li>Finalizes formatted e-book for printing or electronic publication</li> </ul>	
<b>Graphic Designer</b>	<ul style="list-style-type: none"> <li>Primarily responsible for designing the e-book cover</li> <li>Finds and edits graphics, such as photographs or illustrations for book interior</li> </ul>	

Brief bios, which describe and demonstrate the team’s capabilities to successfully handle this e-book projects, are provided in [Exhibit C – Project Team Members](#).

<sup>1</sup> The Center has access to more support if needed.

## Project Review Board

The e-book Project Review Board (PRB) will be responsible for reviewing the e-book content at various stages along the timeline. The PRB will ensure that the project team is on task with the Center vision, mission, and objective for the e-book. It is ideal that the PRB consist of members who are not part of the project team.

## Timeline with Milestones

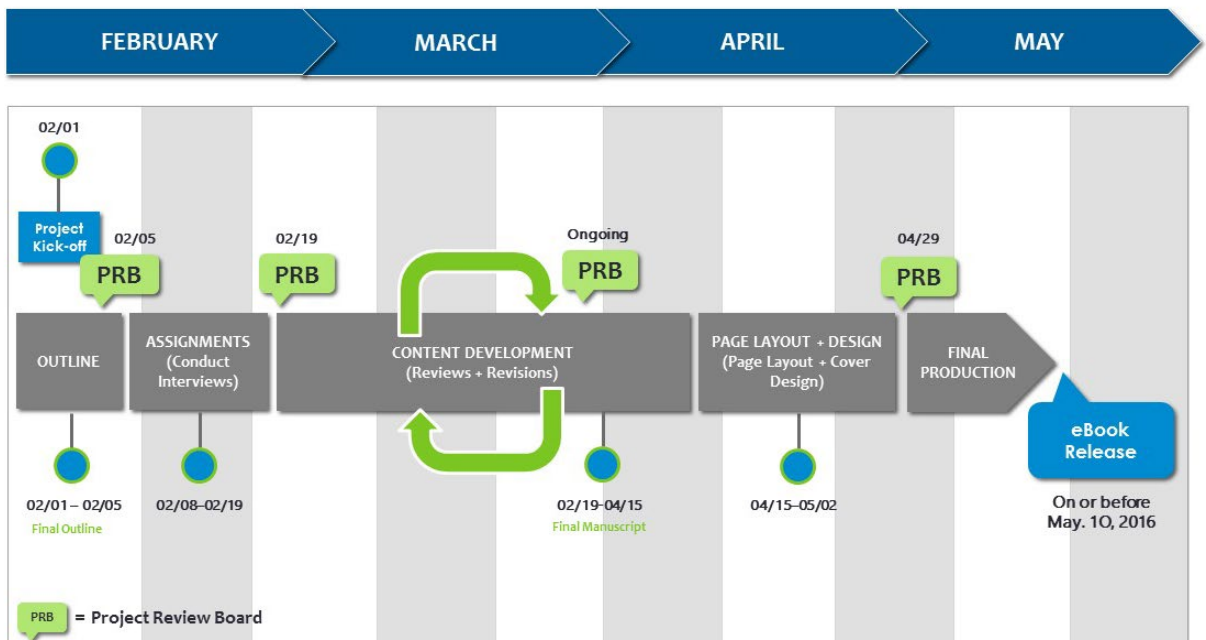
The target release date is **May 10<sup>th</sup>, 2016** to coincide with the annual ClearMark Awards. The initial proposed timeline, shown in Figure 1, illustrates how the project team could effectively handle all associated activities to meet the anticipated release date.

A firmer schedule will need to be established during approval of this proposal and before the project kickoff. The proposed timeline is based on an eight-hour workday and excludes weekends and holidays.

*Note: Pre-scheduled time off for team members has not been factored into this timeline.*

## Proposed Project Schedule

FEB 01, 2016 – MAY, 06 2016



*Figure 1: Proposed Project Schedule. This proposed schedule illustrates how the project team would manage the associated activities to meet the anticipated release date.*

## Deliverables

The final deliverable for this project is the published e-book, *How to Start and Maintain a Plain Language Program Where Your Work*.



## Budget

Most of the work required to create the e-book is being done pro bono by various Center members. The current budget for the e-book is minimal, but there might be some incidentals incurred that are outside of the initial project scope, like those items listed in Table 3.

*Table 3: Project Budget. This is a list of possible incidentals that might be incurred outside the initial project parameters.*

Out of Scope Item	Projected Costs
<b>International Standard Book Number (ISBN)</b>	<ul style="list-style-type: none"> <li>• \$125 (1 ISBN)</li> <li>• \$295 (10 ISBNs)</li> </ul>
<b>eCommerce Plug-In</b>	<ul style="list-style-type: none"> <li>• PayPal (3% per transaction)</li> <li>• WooCommerce (free with WordPress website)</li> </ul>
<b>Book Cover Design</b>	<ul style="list-style-type: none"> <li>• \$350</li> </ul>

## Communication and Coordination

Communications is a crucial component of a successful project. For the e-book project to be effective, timely communications is imperative from all team members, board members, and respective stakeholders. The best approach is to keep everyone informed of project status, issues, and major upcoming activities using email, telephone, Basecamp, and the SharePoint site.

## Special Topics

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### International Standard Book Number (ISBN)

The ISBN is a 13-digit number that uniquely identifies published books. If the Center intends to sell its e-book to the public, an ISBN will be required for each format published. The ISBN is used to identify a title from a specific publisher that is unique to that title. It facilitates the marketing and distribution by booksellers, libraries, and the like.

As the U.S. ISBN Agency, Bowker (Bowker.com) is the ONLY official source of ISBNs in the United States.

**Note: Without an ISBN, your book will not be available in most bookstores.**

### Publishing Company

Since the ISBN is used to identify a title from a specific publisher that is unique to that title, it is advised that the Center determine how it wants to be referenced as a “publisher.” Since the organization is already established, the Center should be able to publish under its current business structure.

## Exhibits

### Exhibit A – Interview Process

The project team will use the following interview questions as a guide to eliciting information for selected interviewees. The answers from these questions, along with the draft e-book outline in the next exhibit, will become the foundation of the e-book’s content.

Proposed Interview Questions	
<b>Section One: Planning</b>	
1.	What prompted you or your organization to start a plain language program?
2.	What were your goals, at the start? <i>Note:</i> Original question had “manager goals vs. internal goals?” Interviewer should probe re: different sets of goals from different parties/stakeholders. <i>Note:</i> See question #16 for follow-up.
3.	Does the government or another body regulate your industry? (industry/business details that may be important)
4.	What were the barriers for starting the program?
<b>Section Two: Implementation</b>	
5.	What part of your organization implemented the program?
6.	What problems did you focus on first?
7.	What did the program look like?
8.	How many people got involved at beginning? <i>Note:</i> See question #22 for follow-up.
9.	How do you work with people who don’t want change? (at various levels of authority)
10.	To what degree did a fear of “dumbing down” slow progress, and how did you address this?
11.	How did you educate writers to understand <b>technical and complex subject matter</b> and communicate well with technical folks?
12.	How did you engage graphic designers to ensure an easy-to-understand message?
13.	How did you keep the program alive over the long-term?
14.	Was there an enforcement component?

Proposed Interview Questions	
15.	Did you reward those who do a great job using plain language?
Section Three: Evaluation/Looking Forward	
16.	Did you meet your initial goals? How do you know?
17.	Did you add and/or meet additional goals?
18.	Was your program a success & how did you measure this?
19.	What positive comments did you get from your staff, from customers?
20.	Any negative reaction?
21.	What did it cost your organization? Was it worth the investment?
22.	How many people are involved now (as opposed to at the start)?
23.	Does plain language feel like part of your organization's culture or are you still working on that?
24.	What do you wish you had done differently?
25.	What are your goals/plans for the future?
26.	What advice would you give an organization looking to start its own program?

The project team believes that the interviewees cannot be the “usual suspects” (i.e., editors, content people, and writers talking about simplicity and clarity). The interviewee list should also contain people from a variety of fields, including those in user experience, graphic design, client service, and nudge theorists, as examples.

While different industries might use different terminology and nomenclature, the message is the same: **Communicate so that your audience understands and can act accordingly.**

By having a good cross-section of interviewees, we can appeal to a broader audience. And, perhaps these would be ideal candidates to become new Center for Plain Language members.

Proposed Interviewee	Point of Contact	Contact Info
Center Board members		
Center sponsors		
S+G		
Irene Etkorn, seigelvision		

Proposed Interviewee	Point of Contact	Contact Info
Katherine Spivey		
Jeanne Etkins (FDA/CFSAN lead		
Ann Brewer (NIH)		
Joe Kimble, lawyer		
Neil James		
Ginny Redish		
Chris Balmford		
Joh Kirby		
Martin Cutts		
Sandra Martin		
Cheryl Stevens		
Joan Basset (Chase)		
Erin Constantin (Wells Fargo)		
Annetta Cheek, Ctr founder		
Steve Krug, author		
Bruce Braley, representative who pushed Plan Language Act		
Al Gore (via Annetta?)		

## Exhibit B – Draft E-Book Outline

The team devised the following draft outline for the e-book, which is in an evolutionary state. We will use this outline as a foundation for developing preliminary content and conducting interview.

Section or Chapter Topic	Main Points	Page Limit	Assigned to
Why Plain Language/Clear Communication?	<ul style="list-style-type: none"> <li>• Governmental regulations</li> <li>• Organization outcomes</li> </ul>		
Top 10 List of Guiding Principles	<ul style="list-style-type: none"> <li>• What principles or tips were most effective for implementing the Program? (e.g., provide training immediately to key people, find a senior-level champion first or hold an event to launch the program to show its importance)</li> </ul>		
Identifying Specific Goals and Objectives for the Program	<ul style="list-style-type: none"> <li>• What are the motivating factors driving the implementation of this program?</li> </ul>		
Getting Support (From Inside and Outside of Your Organization)	<ul style="list-style-type: none"> <li>• Was it necessary to identify a champion, for example?</li> <li>• If so, how was this champion used?</li> </ul>		
Roles and Responsibilities	<ul style="list-style-type: none"> <li>• Were clear roles and responsibilities identified?</li> <li>• Should they have been?</li> <li>• Did this help make the implementation smoother?</li> <li>• How did you recruit people to help implement the plan?</li> <li>• How did you train people (e.g. train-the-trainer model)?</li> </ul>		
Mapping the Program to Business Needs	<ul style="list-style-type: none"> <li>• Discuss the business needs that were the best “sellers” for the implementation program</li> </ul>		
Re-using Existing Material and Resources	<ul style="list-style-type: none"> <li>• Were ideas taken from others who had already implemented a program?</li> <li>• Which existing resources helped the most?</li> <li>• What were the absolute best ones?</li> <li>• How can the Center act as a resource after the eBook/playbook is published (or is this a role it is</li> </ul>		

Section or Chapter Topic	Main Points	Page Limit	Assigned to
	prepared to take on)?		
Outreach Activities (Engagement Plan)	<ul style="list-style-type: none"> <li>Describe the strategy used to get buy-in from various populations in the organization</li> <li>Did it work?</li> <li>How do you know?</li> <li>How did you persuade cynics?</li> </ul>		
Implementation	<ul style="list-style-type: none"> <li>Is it important to have some steps done before others?</li> <li>What is the best starting point?</li> <li>How did you re-adjust when something did not work?</li> </ul>		
Communications Strategy	<ul style="list-style-type: none"> <li>How was the program presented to employees?</li> <li>What types of communication did they need?</li> </ul>		
Program Evaluation	<ul style="list-style-type: none"> <li>How was the success of the program measured?</li> <li>Was it important for plain language to become part of the culture?</li> <li>Identifying problems</li> <li>Further goals and initiatives</li> </ul>		
Challenges and Potential Barriers (General & Industry-Specific)	<ul style="list-style-type: none"> <li>Were these identified from the outset?</li> <li>What solutions were proposed?</li> <li>Did these solutions work or did they have to be tweaked?</li> <li>What challenges did you not anticipate?</li> </ul>		
Plain Language/Clear Communication Resources	<ul style="list-style-type: none"> <li>Style guide</li> <li>Links to other resources</li> </ul>		

### Case Studies

As the team captures case studies from the interviews and other examples found during our research, we will strategically place them throughout the e-book based on the category into which they fit the best.

## Exhibit C – Project Team Members

**Donna M. Creason** is a certified technical communicator, accredited proposal management professional, and published author with two decades of experience in communications, publishing, training development and design, content management, and computer information systems. As a quality-driven communications and management specialist, Donna provides training and development to organizations and individuals. Since 2013, she has been a guest faculty member for the Office of Personnel Management (OPM) Effective Writing in the Federal Government seminar—providing instructor and editor services for: The Plain Writing Act of 2010, the effective use of language, improving research skills, and getting the most out of your reference materials.

**Brian Berkenstock** is a writer, editor, content strategist, plain language devotee, and all-around word nerd. Brian is one of the architects of Aetna’s plain language effort. And he is a board member with the Center for Plain Language.

**Robin Kilroy** is a Learning Advisor (Clear Communication) at the Canada School of Public Service, the training arm for the Government of Canada. She has a deep interest in clear communication, the Web and information design, and believes in sharing her knowledge and expertise with colleagues.

**Beth Landau** is a freelance writer and editor with an MFA in Creative Nonfiction. Beth is a former English teacher and an advocate for chronically ill students. Clear communication has always been her focus. Her series about Gender Dysphoria was a ClearMark Award of Distinction finalist earlier this year.

**Lisa Van Alstyne** is the Chief of the Branch of Policy, U.S. Fish & Wildlife Service, Wildlife & Sport Fish Restoration Program (WSFR). Since joining WSFR six years ago, she has helped the Service toward the goal of applying clear/plain language to regulations, Service Manual chapters, and guidance. This approach has led to less confusion, increased consistency, and clearly defining responsibilities and expectations—all of which helps WSFR to better achieve its conservation mission. Lisa is the primary author of 50 CFR 86—Boating Infrastructure Grant Program, Proposed rule that received a Clear Mark award in the Legal category in 2013. Prior to coming to work for the Service, Lisa worked for New York State for 29 years, combining her passions for writing and the environment. In various capacities of State service, she produced content for environmental education, web sites, and targeted projects.

**Lorna Lockert** is a senior technical writer for a U.S. Navy surface warfare research and development installation. Her job is to translate engineering, scientific, mathematical, and military jargon into clearly understandable products. Lorna’s background includes fiction and nonfiction book and newspaper layout and editing. She strongly encourages authors to simply write, omit the fluff, and avoid the dreadful government-prevalent acronym soup. Lorna is currently drafting a plain language style guide between deadlines.