



# **Changing Places Documentation Project Plan**

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9 October—11 December 2017

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# Project Outline

This project will create a PDF information guide for Changing Places New Zealand.

Project sponsor and SME:	Jenn Hooper
Writer, editor, and graphics designer:	Nat Janke-Gilman

## Project context

Most people are unaware that standard disability toilets are not usable by people with high needs. Changing Places is a system of fully accessible toilets for *all* potential users. The first Changing Place was built in the UK in 2005—there are now over 1000 Changing Places across the UK and Australia.

The first Changing Place in New Zealand will soon be built at Hamilton Gardens (before Christmas 2017). This project has been underway for several years, and has support of the Hamilton City Council (who have allocated funding and permission to build at the Hamilton City Gardens) and a few equipment suppliers (who are donating equipment and installation services). The project sponsor plans to publicly announce the project on 19 November 2017 (World Toilet Day).

There is no budget for creating the information guide or website, though a URL has been purchased and website hosting has been arranged. Creation of a website is outside the scope of this project plan, though the information guide will be written in a way to allow future migration of document content to XML format using Madcap Flare.

## Audience

This documentation will be used by a primarily New Zealand-based audience, including:

- **Potential users** of Changing Places, either people with high needs or their carers.
- **City councillors and decision makers** who control funding to build such projects.
- **Potential advocates** who need appropriate information to lobby their local council to build a Changing Place in their area.
- **Other interested people** who might never have heard of Changing Places before, and who are looking for information.

We can make a few general assumptions about these users:

- Users are likely to seek out information about Changing Places from the internet.
- Some might have only basic computer skills, but we can assume that all users are comfortable using their preferred web browser and a PDF reader.
- They are able to view, download, or print information from a website. We can assume that users with disabilities can operate their own accessibility tools to access content in HTML and PDF formats.
- Users who print information are likely to use A4 paper for printing on a home printer.
- Some readers may have little prior understanding of the issues faced by people with disabilities, so they will need images and simple explanations of those issues.
- Some other readers may know very well the difficulties associated with a particular disability, and may be looking for confirmation that those specific needs are being met.
- Users may be time-poor, have limited attention span, or may need to quickly find information on particular topics of interest.

## Documentation scope

Deliverables for this project include:

- This Documentation Project Plan
- An information guide for Changing Places New Zealand in PDF format (approx. 24 pages)
- A “lessons learned” report for the project, presented as a 10–15 minute video

All deliverables will be published in the public domain.

Some copies of the guide might be printed and bound for distribution, but we can assume that most users will view the PDF file on their computer or print their own copies on A4 paper.

The guide will be written using Microsoft Word and converted to PDF using Adobe Acrobat Pro.

The document will be an information and reference guide, explaining what Changing Places are, why they are needed, and providing guidance on how to build one in your own community.

The document will *not* be an instruction manual for using Changing Places toileting equipment.

As a separate project, a website will be created for Changing Places. The information guide will be made available for download in PDF format from the website. Creation of the website is outside the scope of this documentation project, however content created for the information guide may be used on the website and topics written for the guide may later be migrated to Madcap Flare. Therefore, I will plan for future migration of content from Word to XML format by using Word styles for all formatting and by using a topic-based approach to writing.

This project plan will be published on the blog site <http://drnatjg.com>, but only after public announcement of the Changing Places New Zealand project on 19 November 2017. The lessons learned report will be created as a video using Camtasia Studio 8 and published on Youtube.

# Resources

## Subject matter experts (SMEs)

The project sponsor (Jenn Hooper) is the primary SME for this project. Jenn is a personal friend of mine and easy to contact. She has worked on the Changing Places project for many years and has a deep understanding of the important messages and issues involved.

I will be a second SME for this project. My son has high physical/mobility needs, so I understand many of these issues personally. However, many potential users of Changing Places have forms of disability which I am less familiar with.

I have many friends in the New Zealand disability community. I will use these contacts as test subjects for user testing and canvas opinion or seek insight from this group as necessary.

## Information sources

Changing Places UK and Changing Places Australia have a great deal of information available on their websites. Those organizations have already found solutions to many problems and have pledged their support to Changing Places New Zealand. However some of that information does not apply to the context of our project, and is not presented in a way that meets our users' needs. This documentation project is based on fresh user needs analysis. Since all content will be either newly written or substantially rewritten for this project, I do not foresee any copyright issues.

Designs and specifications will be available from the Changing Places building project and our suppliers.

We have secured permission to use the international Changing Places logo, and a New Zealand trademark application is in progress. We have already received corporate logos from equipment suppliers and key supporters. I have already created a few new image resources.

We will need to secure permission for all photos and images used in the information guide. Some images will be taken from Changing Places UK or Changing Places Australia with written permission. Some other images will be taken from the public domain. Some photos will be taken by myself or another photographer, with signed release forms from all photography models, for use of their likeness in published materials and advertising.

## Tools

I will do my own graphic design and image editing using Microsoft PowerPoint, SnagIt, Paint.Net, and GIMP.

I will use Microsoft Word to write and format the information guide, then convert it to PDF using Adobe Acrobat Pro.

At a later date, documentation may be migrated from Word to XML format using Madcap Flare.

I will track progress in this project using Microsoft Excel.

I am familiar in the use of all these tools, and I have access to the necessary software licenses.



# Information design

## Writing strategy

**The document must be accessible** to accommodate users with a wide range of disabilities. The project will take guidance from the WCAG 2.0 and WAI-ARIA accessibility standards, which will be the standard for the companion website (to be created at a later date).

Topics will be written in **plain English**, using non-technical language, New Zealand spelling, and a conversational tone. Topics must be simple enough for someone with no prior knowledge to understand, while following the rule “don’t explain the obvious”. The writing level will be pitched for a high-school reading comprehension level, without shying away from using the correct technical terms for disabilities and disability equipment. Where necessary, technical terms will be presented with a simple definition or explanation. The aim is to be simple and clear without talking down to the audience.

The rule is “**no robot speak, no unnecessary images**”. Similar ideas will be presented in similar ways, but there will be no formulaic approach to creating definitions, sentence structure, or images. Every piece of writing and every image must be structured in the best way to explain individual concepts.

Topics will be **written in Microsoft Word, using styles** for text formatting. At a later date all topics will be migrated to single-source XML content and CSS styles in Madcap Flare. The conversion process will be made much easier by using styles in Word. Using styles in Word and Flare will help towards the ultimate goal of producing responsive, fully accessible documentation in HTML.

The document will use **clear headings and topic sentences** to simplify user navigation. Headings will use built-in heading styles, which helps accessibility programs to parse the PDF file. The document will have a Table of Contents and Index. To help users scan for information, headings will use parallel language structure and each paragraph will begin with a topic sentence.

The document will have **clear visual presentation** by using simple design, readable fonts, and adequate colour contrast. All colour images must work equally well when printed in greyscale, to ensure accessibility for colour-blind readers and people with cheap home printers. All non-decorative images must have a meaningful caption for users with visual impairments.

## List of Topics

The list of topics below is based on user needs analysis. It is an estimate only, and the table of contents may change during the writing process.

Topic code	Pages	Images	Topic name and description	Type
-	1	-	Title page	-
-	1	-	Front matter	-
-	1	-	Table of contents ( <i>automatically generated</i> )	-
-	-	-	<b>Introduction</b> ( <i>section heading</i> ) <i>Conceptual information for a wide audience, with no assumed prior knowledge.</i>	-
A1	1	1	What are Changing Places?	concept
A2	1	1	Who needs Changing Places?	concept
A3	2	2	Where should Changing Places be located?	concept
-	-	-	<b>Equipment and design</b> ( <i>section heading</i> ) <i>Describes in general terms what a Changing Place looks like, what sets them apart from other toilets.</i>	-
B1	5	5	Key features	concept
B2	2	2	Room layout	reference
B3	1	-	List of minimum requirements	reference
-	-	-	<b>Making it happen</b> ( <i>section heading</i> ) <i>Information aimed at city councilors and user advocates, to help people build new Changing Places.</i>	-
C1	1	-	Legislation: Health and Safety, Equality, Disability	reference
C2	1	-	Funding: Projected costs, sources of funding, where to obtain special equipment	reference
C3	2	-	Planning and building process (Planning, consenting, and building codes) “Plan and Build Checklist”	procedure
C4	2	-	Ongoing maintenance (Management, training, security, maintenance) “Management and Maintenance Checklist”	procedure
D1	1	(logos)	Acknowledgements and Sponsors	reference
E1	1	-	Contact us/More information	reference
-	1	-	Index	-
<b>Totals:</b>	<b>24</b>	<b>12</b>		

# Development Plan

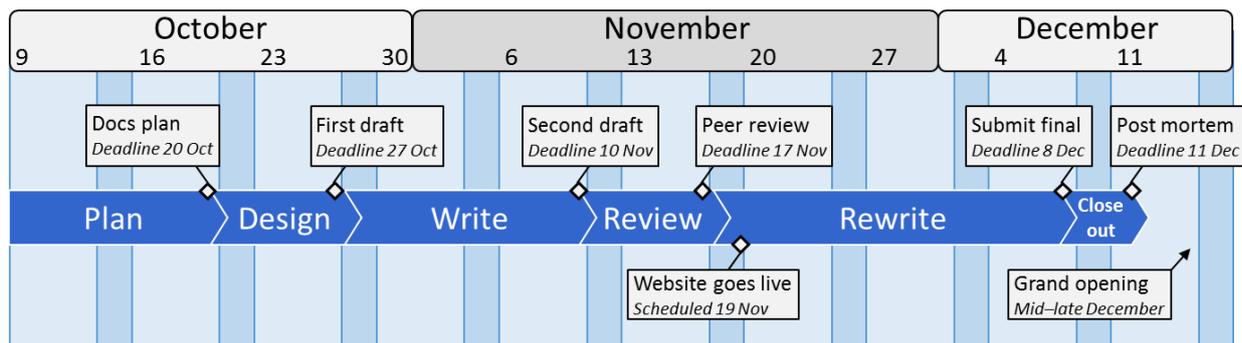


Figure 1: Development cycle for the Changing Places documentation project.

This plan outlines the activities during each phase of the Changing Places documentation project. The main objective is to create a PDF information guide using Microsoft Word.

Every phase of the project depends on the previous phased being complete.

## Project roles

Roles	Name
Project Sponsor, Subject Matter Expert	Jenn Hooper
Project management, Writing, Editing, Indexing, Graphic design	Nat Janke-Gilman

## Phase 1. Plan

Project Management	<ul style="list-style-type: none"> <li>• Define the project goals and stakeholders.</li> <li>• Conduct audience analysis to understand user needs.</li> <li>• Conduct user task analysis to create a draft list of topics to write (documentation scope).</li> <li>• Analyze project constraints, risks and dependencies.</li> <li>• Develop the project plan.</li> <li>• Acquire resources.</li> <li>• Obtain agreement and sign-off by stakeholders.</li> </ul>
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◇ **Milestone:** Submit project plan as TCOM410 Assignment 2, deadline 20 October 2017.

## Phase 2. Design

Writing and editing, Graphic design	<ul style="list-style-type: none"> <li>• Interview Subject Matter Experts (SMEs) and stakeholders to understand system scope.</li> <li>• Create a detailed document outline, based on agreed document scope.</li> <li>• Define the writing style, create a style sheet.</li> <li>• Write one complete topic to use as a prototype.</li> <li>• Create a design (page layouts, graphics styles, and text formatting, front/back matter) for the PDF user guide.</li> </ul>
Project management	<ul style="list-style-type: none"> <li>• Monitor progress.</li> <li>• Revise the project plan and schedule as required.</li> <li>• Communicate with stakeholders and manage expectations.</li> </ul>

◇ Milestone: Submit first draft as TCOM410 Assignment 3, deadline 27 October 2017.

## Phase 3. Write

Writing, Graphic Design	<ul style="list-style-type: none"> <li>• Interview SMEs to understand system functions.</li> <li>• Create content according to the documentation scope, this includes writing topics and creating images.</li> <li>• Pass content to the Docs Project Manager when complete, then move on to the next topic.</li> </ul>
Editing	<ul style="list-style-type: none"> <li>• Edit content for structure.</li> <li>• Edit content for style and compliance with templates.</li> <li>• Check content for accuracy, usability, and 'fit' with documentation requirements.</li> <li>• Update the style sheet as required.</li> </ul>
Project management	<ul style="list-style-type: none"> <li>• Monitor progress.</li> <li>• Revise the project plan and schedule as required.</li> <li>• Communicate with stakeholders and manage expectations.</li> </ul>

◇ Milestone: Submit second draft as TCOM410 Assignment 4, deadline 10 November 2017.

## Phase 4. Review

In this phase I will review other TCOM410 students' projects, and others will review my project.

Editing	<ul style="list-style-type: none"> <li>Review other TCOM410 students' projects for writing, content, terminology/word usage, consistency, structure, and information design.</li> <li>Provide feedback on other projects.</li> <li>Receive feedback from others.</li> </ul>
Project Management	<ul style="list-style-type: none"> <li>Circulate draft copies of the information guide to a wide audience, for user testing.</li> <li>Solicit feedback from a range of users.</li> </ul>

◇ **Milestone:** Submit peer review as TCOM410 Assignment 5, deadline 17 November 2017.

## Phase 5. Rewrite

The main objective of Phase 5 is to incorporate feedback from the peer review and finalize the PDF information guide.

As a *stretch objective*, the information guide will be migrated from Word to XML in Madcap Flare, so both PDF and HTML output are generated from the same source content (Phase 5a).

Writing, Graphic design	<ul style="list-style-type: none"> <li>Update and finalize the design (page layouts, graphics styles, and text formatting, front/back matter) for the PDF user guide</li> <li>Revise all content (text, images) based on feedback.</li> </ul>
Editing	<ul style="list-style-type: none"> <li>Conduct final edits for structure and style.</li> <li>Conduct final edits for compliance with templates.</li> <li>Check content for accuracy, usability, and 'fit' with documentation requirements.</li> <li>Update the style sheet as required.</li> </ul>
Indexing	<ul style="list-style-type: none"> <li>Create an index.</li> <li>Prepare a list of keywords for search.</li> </ul>
Docs Project Manager	<ul style="list-style-type: none"> <li>Monitor progress.</li> <li>Revise the project plan and schedule as required.</li> <li>Communicate with stakeholders and manage expectations.</li> </ul>

◇ **Milestone:** Submit final document as TCOM410 Assignment 6, deadline 8 December 2017.

## Phase 6. Close-out

The objective of Phase 6 is to close out the project, review all lessons learned, and submit a final report in the form of a video presentation.

Project management	<ul style="list-style-type: none"> <li>• Compare project plan estimates with actuals.</li> <li>• Review “lessons learned”.</li> <li>• Archive project files.</li> </ul>
Writing, Video editing, Graphic design	<ul style="list-style-type: none"> <li>• Create a script for a short video presenting my project and “lessons learned”.</li> <li>• Shoot and edit the video using Camtasia.</li> <li>• Upload final video to Youtube.</li> </ul>

◇ **Milestone:** Submit presentation as TCOM410 Assignment 7, deadline 11 December 2017.

## Ongoing maintenance

After this project ends, ongoing maintenance of the documentation will be performed by Nat Janke-Gilman. This will likely become part of a project to migrate the information guide to XML format and merge it with the website as a Madcap Flare project.

The project sponsor expects to form a charitable trust in 2018 for Changing Places New Zealand, which will take ownership of all intellectual property and ongoing project work. At that time, I will hand over all documentation to the trust for ongoing documentation maintenance.

## Project management

Throughout the project I will record the time spent on various documentation development activities for accurate post-project analysis, and to increase the accuracy of future documentation project plans.

I will use a burn-down chart and Excel spreadsheets to track progress.

As changes occur, I will update this project plan.

Throughout the project I will routinely communicate all changes and progress with stakeholders.

## Timeline

- The project began on 9 Oct 2017 (a Monday) and ends on 11 December 2017.
- All project dates and times are based on the New Zealand calendar, with fixed dates and deadlines as described below.

Date	Event or deadline
Friday 20 Oct 2017	Submit project plan
Friday 27 Oct 2017	Submit first draft
Friday 10 Nov 2017	Submit second draft for peer review
Friday 17 Nov 2017	Submit peer review of other student project Receive peer review of this project
Sunday 19 Nov 2017	Public announcement of the project, website goes live
Friday 8 Dec 2017	Submit final document
Monday 11 Dec 2017	Submit “lessons learned” video
Late Dec 2017	Changing Place opens in Hamilton Gardens, NZ

- The time available to me for project-related activities is flexible, approximately 4 hours per day and 6 days per week (maximum 24 hours per week).
- The following time estimates are based on notes from *Writing Revisable Manuals* by Duncan Kent and my own prior experience:

Phase	Task	Level of effort (estimated)	Total effort
2	Document design and layout	15 min/page	5 hrs
2	Create first ‘template’ topic	4 hrs/page (assume 4 pages)	16 hrs
3	Writing—initial draft	2 hrs/page (20 pages)	40 hrs
3	Create images	1 hr/image (12 images)	12 hrs
3	Editing	15 min/page (24 pages)	6 hrs
4	Peer review	15 min/page (assume 24 pages)	6 hrs
5	Revise/rewrite	2 hrs/page (24 pages)	48 hrs
5	Proof-reading	5 min/page (24 pages)	2 hrs
1–5	Project management	10% of total effort	14 hrs = 2 hrs/week
6	Post-project analysis	4 hrs	4 hrs
6	Create 15 minute video	2 hrs write + record 2 hrs edit + produce	4 hrs

## Project risks and control measures

Analysis of project risks, constraints, dependencies, and assumptions.

Issue	Control measure or contingency plan
<p><b>Risk:</b> Photos. It might be hard to get good photos</p>	<ul style="list-style-type: none"> <li>• We have permission from Changing Places UK to use their IP, including images. As a fall-back, just copy these temporarily.</li> <li>• As I work, I'll create a schedule of photos required.</li> <li>• Then I'll take photos myself or arrange for someone else to do it.</li> </ul>
<p><b>Risk:</b> I'm busy. Too busy at work and at home to write. Too many projects running in parallel.</p>	<ul style="list-style-type: none"> <li>• Use topic-based approach. Compartmentalize so when I get a chance to write, I can leap in. This also allows me to think about topics while I'm doing something else.</li> <li>• Important to keep working on project planning, to reduce anxiety and stay sane.</li> <li>• Maintain forward momentum by putting in at least <i>some</i> work on the project every day, no matter how small the contribution.</li> </ul>
<p><b>Risk:</b> the website could take over. Timetable for press releases could take over the schedule.</p>	<ul style="list-style-type: none"> <li>• Just use an off-the shelf Flare template with minimal changes. This will reduce workload.</li> <li>• Use filler text in the website, for starters.</li> <li>• Just concentrate on content—writing words and collecting good images. Worry less about how it looks on the page, more about what it all says. Content can get copied straight between the User Guide and website projects. Dump text into it as I go.</li> <li>• The User Guide is the main event here, with the website following along behind. “Merely ok” is good enough for the initial website. Don't worry, it will catch up and eventually become awesome.</li> </ul>
<p><b>Risk:</b> project stalls because a phase is waiting for something.</p>	<ul style="list-style-type: none"> <li>• Avoid project gridlock by using a topic-based approach.</li> <li>• Phases are fluid, there's no need to keep the whole project back from editing until all topics are written in draft form—instead, it's OK for individual topics to be at different stages of development.</li> </ul>
<p><b>Risk:</b> project falls behind schedule.</p>	<ul style="list-style-type: none"> <li>• Just release what I can, when I can.</li> <li>• It's ok to submit a draft for review, with some topics complete, some topics in draft, and some topics missing.</li> <li>• Remember, the final release date is 8 December, and that only includes the User Guide.</li> <li>• As required, reduce scope e.g. ditch the index or entire topics.</li> </ul>
<p><b>Risk:</b> lost files. File mix-up. Can't use Flare with Dropbox on my work computer.</p>	<ul style="list-style-type: none"> <li>• Save files to the USB stick, and copy to Dropbox.</li> <li>• The USB stick is the master copy.</li> <li>• Dropbox is the backup.</li> <li>• During this project, do all writing on my work computer. This will eliminate issues like different fonts installed on different computers, double-handling of master/backup files.</li> <li>• Later on, use web fonts in the Flare project for the website.</li> </ul>