Public Service Essentials

Counter Culture & Efficiency Tools for the Planner

by Paul R. Sweum, Principal
Top Hat Word & Index

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Introductions

- About Paul
  - Principal of Top Hat Word & Index since 2006
  - 20+ years as a town planner & technical writer
  - Certified indexer since 2010, on ASI's nt'l BoD
  - Focus on document usability
- Career missions
  - To support planners in their difficult jobs
  - Further the understanding of document usability and its essential role in government & business
  - Help bring usability and indexes into fields outside of typical publishing circles

Introductions

- About you
  - Introduction
  - Where (or with whom) are you planner?
  - Please tell us about a need you have in your job, and what you hope to learn from this presentation today

Why are we here today?

- To reframe counter culture at city hall & your office of planning or community development
  - Client services
  - Methods & tools for efficiency
- Turn it around!
- Reframing = changing perceptions
- **Oh no! Will "THE STIGMA" make an appearance?**

One really bad example

"I wish people would quit interrupting me. I have important work to do."

— *unfortunate statement from a planner (a long time ago in a dept far, far away)*

- Don't lose sight of who we're supposed to be serving
- How can we improve?
  - I'm inviting you to be part of an ongoing discussion today about new and improved ways to serve the public!

"Customer" or "Client?"

- Who, by definition, are we working with?
- Customer
  - A person or organization that buys goods or services from a store or business.
- Client
  - A person or organization using the services of a lawyer or other professional person or company.

~ Merriam-Webster.com

It's a CLIENT, baby! (Yeah!)

Types of clients

- Developers & contractors
- Attorneys & realtors
- Everyday public
- Public officials /decision-makers
- Staff & coworkers (Hey! Don't forget us!)
- Others you can think of?

Workshop audience

- Supervisors
  - Who do I assign to the counter?
- Employees
  - What is expected of me at the counter?
- Clients
  - What do I expect when I visit the counter?

An old adage you may have heard before…

It's not whether or not there is a conflict of interest…

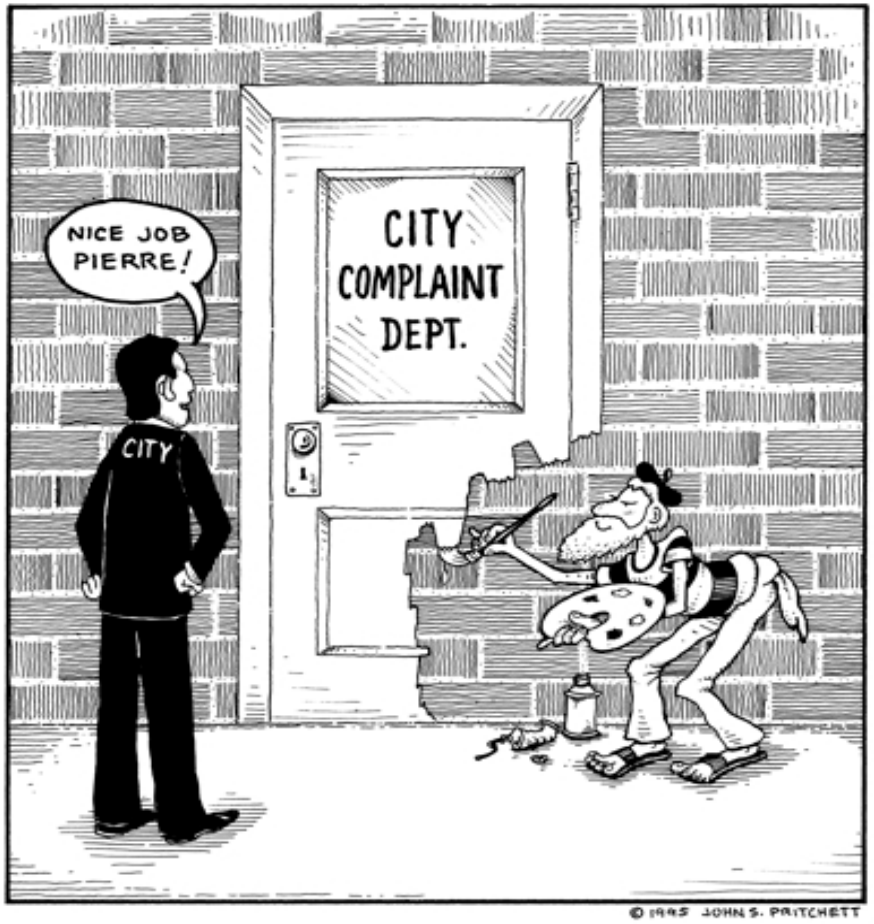
…it's whether or not there's the *PERCEPTION* of a conflict of interest!

Perceptions & THE STIGMA

Generally speaking, for many years — especially before technological advances — how do you think encounters and visits with city and county planning offices were perceived?

Friend or foe?

Or better yet…
…well, not really.



Let's get rid of THE STIGMA

Oh No! It's a STIGMA!

STIGMA = Bad & scary things

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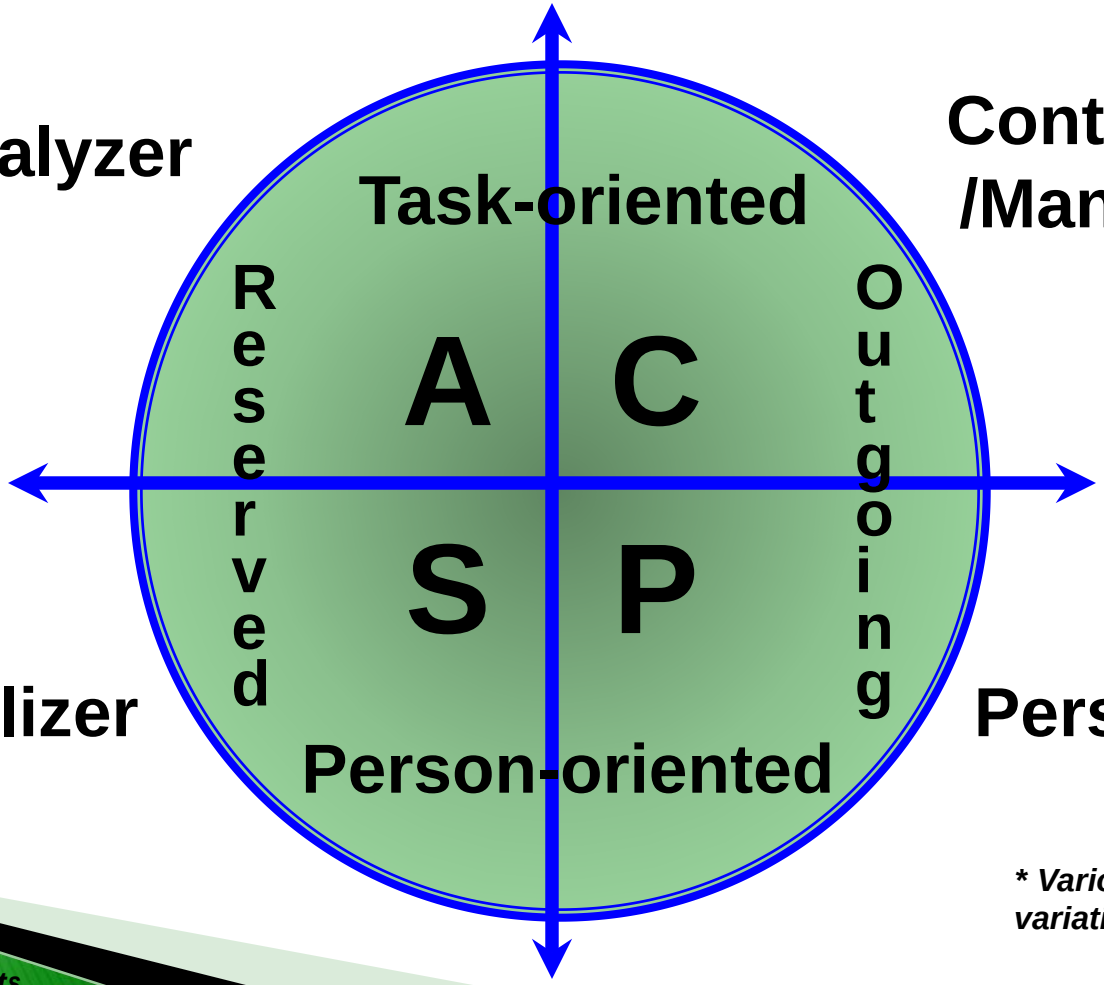
Understanding why the client/planner relationship has breakdown tendencies

- It's a relationship engineered for conflict — long before the client walks through the door
- Why folks coming to the counter come across as agitated or angry
- The planner as psychologist

What's an effective tool to help planners?

- What if we were armed with the ability to get inside the minds of the client BEFORE they come to the counter?
- From diffusing to productivity…how do we turn a frustrated inquirer into a happy camper when they leave city hall?

In a nutshell: The four main behavior styles *



** Various sources & variations over time*

Behavior styles: what about them?

- Each style or style combination has unique strengths and blind spots
- No one style is “the best”
- Comparing and contrasting the styles should only be done to create more effective communication and interaction between the different styles

Behavior styles: what do they mean for workplaces?

- They affect the way in which people make decisions
- Call out the need (or lack of need) for quality, accuracy and perfection
- Presence for either a dynamic ever-changing, or stable environment
- The tendency to be socially cautious, or assertive

More on behavioral styles

- Most planners are Stabilizer/Analyzers
- In time, identifying these traits in clients and co-workers will make your day easier
- For example, staff can differentiate how they see themselves versus how others see them *

** Training content from The Effectiveness Institute (Bellevue, WA)*

Setting the tone = steering toward a successful outcome

- The planner is the host
- Diffusing potential conflict
- Maintain a pleasant demeanor
  - Smile! (try to *especially* when you don't feel like it)
  - Humor (assess your audience first)

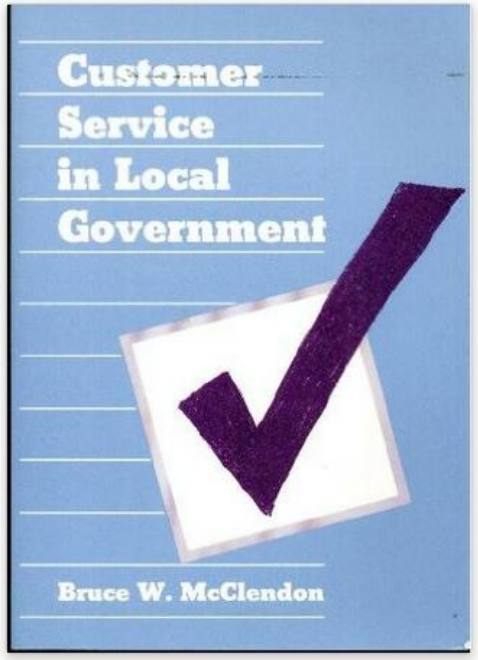
First impressions count

- We are Ambassadors…and as such, we represent:
  - Our City, County or State
    - People and organizations who employ us
  - Our Planning or Building profession
    - Codes, ethics, education & training
  - Ourselves as people
    - Conscience, humanity & socialization

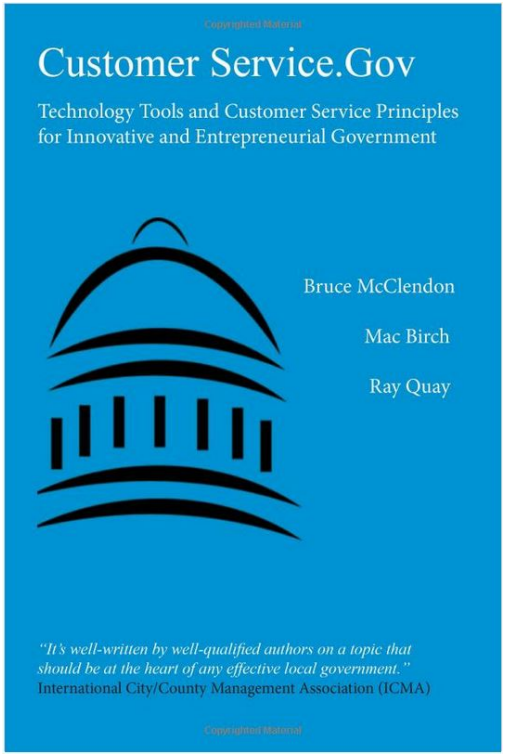
Listen to voices of experience

Effectiveness Institute

Founded by Dr. Bill Maynard and Tom Champoux in 1980. Go to the website to read about how they transformed the culture at Cleveland High School (Seattle, WA) in the 1970s.



By Bruce McClendon



By Bruce McClendon, with Mac Birch and Ray Quay

Supervisors as mentors

- Attitude makes a BIG difference
- Identify employees with people skills
- Create a “Culture of Cooperation”

Why customer service is important

Planning officials are now finding themselves interacting with a smarter, more sophisticated, sometimes hostile public. People like this new emphasis on service and expect the same from local government. Unfortunately, for this reason some planning programs have lost their credibility."

~ Ray Quay

First: communication

"The first step in the communication process should be planners listening to what their 'customers' believe they need…NOT the other way around. Until we focus entirely on those we serve, we will continue to lose relevance, regardless of how well we communicate our 'message.'"

~ *Michael Petrenko*

Your turn at the counter

- Expectations of the person at the counter
  - Treat others as you would like to be treated
    - Be courteous
    - Listen, understand and take people seriously
    - Know the plans and codes you work with
  - Know where (or who) to go to for reinforcements
  - Write down questions and call people back
- Know the following!
  - Your hot buttons….and your limits….and what battles to pick

It's your house, so own it!

- Have a grasp of your subject matter & tools
- Know your equipment & where information is harbored…more on this later

When a client mistreats you

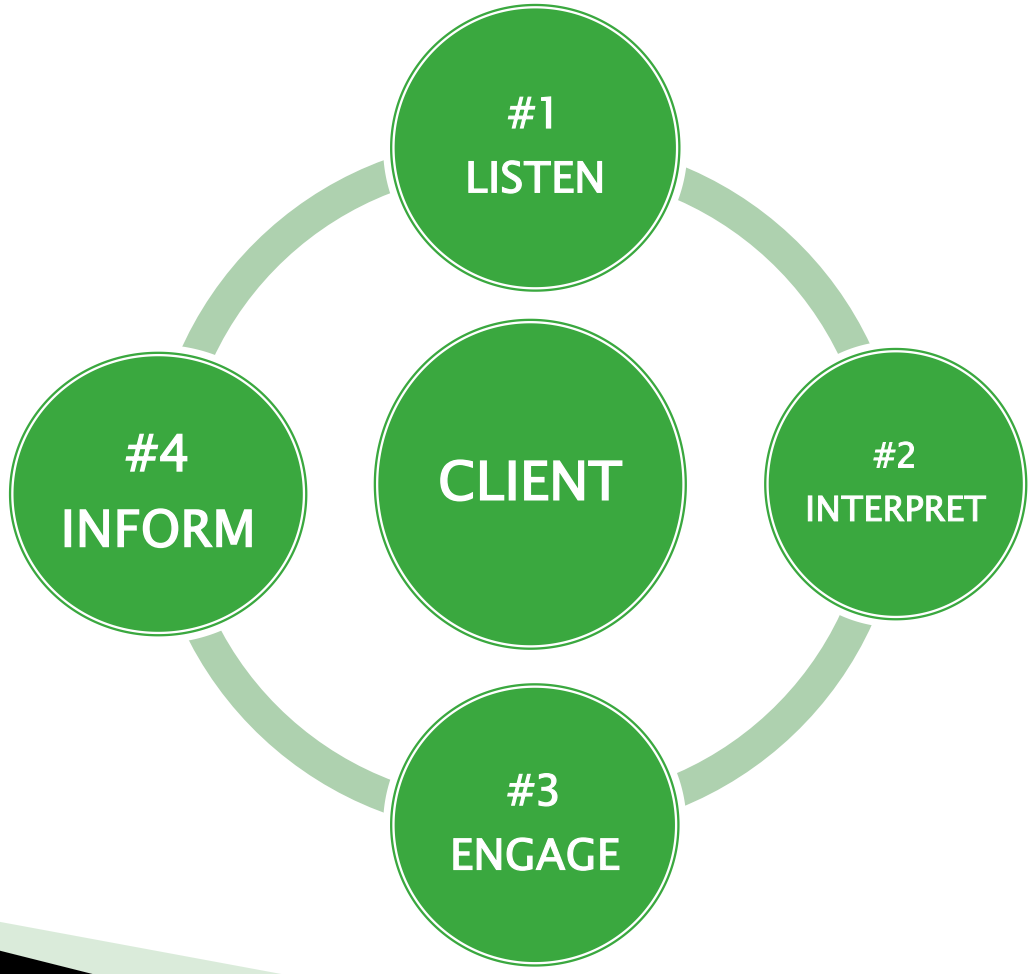
- Remember the behavior types!
  - This is easy to forget at the time you need it — it'll take some practice to train your brain for this
- Have a protocol in place at the office that staff can follow
- It's okay to ask someone to leave until they cool off

Two-way street

- "The first and most important principle of customer service is continuously listening, learning, caring and responding as quickly as possible to the information you get from your customers."
  - Local governments that are not actively engaged in listening and adapting their services to meet the needs and expectations of their customers and citizens are setting themselves up for disappointment and failure.

~ Bruce McClendon

Communication Feedback Loop



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Client service redefined

- Planning programs that **THRIVE**
  - Are valued partners in a community's agenda
  - Adopt new views towards planning
  - Are more pragmatic and focus on the quality and timeliness of service delivery
  - View the public as clients who have problems that need to be solved
  - Structure programs to help people learn how to solve their problems (on their own or in partnership with local government)

~ Ray Quay

The *client* is always right?

"I continue to preach that helping and empowering clients to find and solve their own problems is the key to relevance and effectiveness for planners. The negative public perceptions of planning have been improved when results have been produced."

~ Bruce McClendon

Framing expectations

"The goal of every planner should be to treat everyone like a (client) and to provide them with effective planning services. To me, effective planning is a remarkably simple concept. It is planning that makes a difference, produces results, and, most of all, is satisfying to our (clients)."

~ Bruce McClendon

Effective tools for interacting with the public

- Computer & Internet: access to codes & content (preferably) online
- Application forms: *WHAT* all are they, and *WHERE* are they at?
- Filing system: DO you have a reliable, accessible filing system for projects?
- Maps: land use, zoning and regional
- In-house documentation: ultimately we want *FINDABLE* content

The Usability Effectiveness Model©

DOCUMENT USABILITY

ACCESSIBILITY

- Delivery mechanisms
- Section 508 compliance

FINDABILITY

- Document design
- Content retrieval tools

M.P.U.*

* *Maximum Potential Understanding*

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Document Usability

- Paul's interpretation…

"Usability suggests applicability for something that may not appear — at least through first sight or an initial assessment — to be usable, or perhaps its full capabilities are simply unknown or untested"

Public perception of government documents

Common trappings of government documentation

- There is no TripAdvisor or Yelp to evaluate gov't offices (or is there?)
- Documents make sense to the planner (we hope), but not to the public
  - **JARGON**…"What's this thing called again?"
  - **WRITING FORMAT**…because it's policy-driven, a cumbersome read and makes content appear unfriendly to users
  - **FINDABILITY**…how do we find specific content AND find it quickly?

Types of usability features

- Abstract
- Glossary
- Index
- Case study
- Graphic content
- Document design

Usability features can go in…

- Comprehensive & general plans
- Capital facilities & strategic plans
- Area & specific plans
- Governing documents (homeowner's associations)
- Annual reports for shareholders (in business)
- Current & upcoming document projects

Documents with NO usability features

- Public's perception
  - There's no usability in the document to help find what they're after
  - Staff fumbles through and doesn't appear to know their stuff
- Oh no, not *AGAIN!*
  - Staff, on deadline, are called to the front. Again.
  - Access to content is time-consuming, clunky, and frustrating for ALL users…
  - …then unnecessary time spent on "Planning 101"
  - Added staff time & OT for priorities = budget $$$

Why is document usability overlooked?

- Staff is focused on managing the project
  - Managing staff and consultants
  - Managing the meetings involved, public hearings and politics
  - In addition to juggling multiple other duties
- Staff is focused on the project's content
  - Writing drafts, plan elements, census info, etc.
- Staff doesn't have the time, expertise or simply doesn't know any better…
  - …and that's why I'm talking about it today! ☺

Documents WITH usability features

- Public's perception
  - Document's are navigable and purpose is clear
  - Staff maintains sharp, professional image
- Usability brings plans and codes to life!
  - Speedy access to content
  - Polished document design
  - A happier, more informed target audience
  - A cost-effective tool that continues to save staff time
  - Serves as an effective training tool for new staff

Abstract

- What is an abstract?
  - A condensed, unbiased statement that explains the document's purpose
- Where should it go in the document?
  - It should be the first thing the audience sees
    - In print, on the cover or title page of the document
    - Electronically, at the top of the landing page or PDF
- What will it accomplish?
  - By understanding its purpose, the user will have a better idea if they actually need to interact with the document

*** Note:** Executive Summary is basically a "biased" abstract intended to "sell" the user

Glossary

- What is a glossary?
  - An alphabetized section of the document that explains terminology and jargon typical to the content
- Where should it go in the document?
  - Typically in the back matter following the main content
- What will it accomplish?
  - A more informed target audience that understands the content of the document

Index

- What is an index?
  - A quick reference tool that provides multiple entry points to specific content
  - Essentially the first hyperlinks
  - The most critical usability tool in a document
  - An index is NOT "search" — it's more advanced
- Where should it go in the document?
  - The caboose: at the rear of the document
- What will it accomplish?
  - Quick access to specific content
  - *Invisibility* is a sign of a good index

An index is NOT "search"

"Search involves a query using keywords and results in a listing determined by criteria from the search algorithm. An index is different from search by design; it does not trigger a listing based on keywords but contains detailed, context-oriented subentries to find specific content through page references. Indexes, which maximize findability and the user experience, are more time-saving than the basic search features found in PDFs and electronic media."

~ P. Sweum, THW&I
April/May 2016 issue of *Western Planner*

A comparison of content retrieval tools

This analysis of various tools reveal potential successes in *findability*. The more complex the technical documentation, the more accuracy and timing factor into content retrieval events. See THW&I blog for more.

Content retrieval tools:	Search	Concordance	Index
What about it?	Typical in electronic media like PDFs, e-books & websites	Alphabetized listing referred to (mistakenly) as a "computer-generated index"	Created by a trained professional indexer with subject knowledge
Includes page locators?	✗	✓	✓
Provides subentries?	✗	✓	✓
Creates subentry context that makes sense?	✗	✗	✓
Creates *"See"* and *"See also"* references?	✗	✗	✓
Provides guidance to the accurate spelling of terms?	✗	✓	✓
Addresses situations with dates and chronologies?	✗	✗	✓
Addresses other special situations like diacritics?	✗	✗	✓
Creates crafted notes to alert the user to these special situations?	✗	✗	✓
Presents every single occurrence from your search input, assuming the spelling was correct.	✓	✗	✗

The index in your planning documentation

- Dives deeper into content than the broad strokes of a TOC
- Breaks through the “silo” structure and cumbersome tendencies of chapter content
- Frees up critical policy content
- Changes perceptions by “bringing the document to life”

Case study

- What is it?
  - A real-world example that makes complex information or data understandable and relatable
- Where should it go in the document?
  - Throughout the main content, as-needed
  - On or near the same page as the content it is helping to explain
  - “On display” in a text box near a margin
- What will it accomplish?
  - Makes content easier to process and understand

Document design

- What is it?
  - The layout and how content is presented
  - themes, styles and fonts
- Where should it go in the document?
  - It *IS* the document
- What will it accomplish?
  - Readability
  - Besides the index, most critical usability component due to its global affect (on the document)

More on document design

"Not only does the impact of design hover with the user through their entire interaction with the document, it frames the first impression and final determination of its usefulness."

~ P. Sweum, THW&I

April/May 2016 issue of *Western Planner*

Glossary usability exercise

- Break into three groups
  - Assign a note-taker, a speaker (for the answers), and the rest may share reader/researcher duties
- Each group has a copy of the East Bay Regional Parks District *2013 Master Plan*
- Please ANSWER the following *IN 3 MINUTES*:
  1. **What does the acronym "KEP" stand for?**
  2. **What specifically do "units" mean in this plan?**
  3. **What is "land banking?"**

Results for glossary usability exercise

1. **What does the acronym "KEP" stand for?**

   Key Elements of the Planning Process

2. **What specifically are "units" in this plan?**

   Under *Parkland Classifications*, a policy of the Master Plan classifying parklands into various land use designations; specifically "Natural Units" and "Recreational/Staging Units"

3. **What is "land banking?"**

   Property acquired by the District that is not open to the public until constraints on public access are removed.

Index usability exercise

- Each group has a copy of the East Bay Regional Parks District *2013 Master Plan*
- Please ANSWER the following *IN 3 MINUTES*:

1. **I'm with an environmental org and concerned about projected rises in sea levels. Does this plan discuss that issue?**
2. **An inquirer is at the counter, and wants to know if preserving open space is a priority for the District. If it is, where is that called out in the Master Plan?**
3. **I want to walk the Marsh Creek Regional Trail, but the name makes it sound like a soggy walk. How do I know if it features a paved path?**

Results for index usability exercise

1. **I'm with an environmental org and concerned about projected rises in sea levels. If this plan discuss that issue, where do I find it?**

   Yep! ~ p. 31 ("sea levels, rise in" main entry [ME])

2. **An inquirer is at the counter, and wants to know if preserving open space is a priority for the District. If it is, where is that called out in the Master Plan?**

   Yep! ~ p. 131 ("priorities for" SE under "Master Plan" ME)

3. **I want to walk the Marsh Creek Regional Trail, but the name makes it sound like a soggy walk. How do I know if it features a paved path?**

   Yep! ~ p. 64 ("Marsh Creek Regional Trail" ME)

Abstract exercise

- Each group has a copy of the East Bay Regional Parks District *2013 Master Plan*
- In each of your groups, write an abstract for the Master Plan in 2-3 short paragraphs (150-200 words)
- Writing an abstract is more challenging than one may think. In a nutshell, you're encapsulating a description of the plan you're writing about while maintaining the mantra of "less is more."
- We'll take *5 MINUTES* for this exercise.

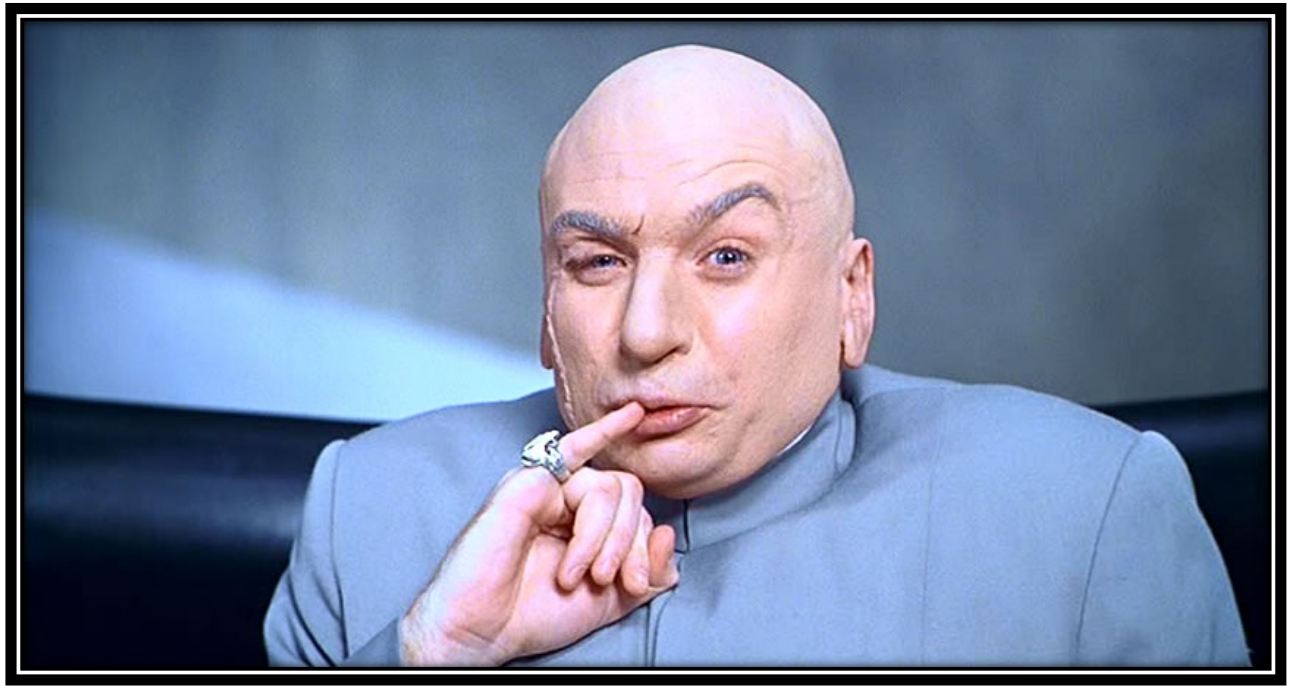
Abstract exercise (cont.)

- A few pointers!
  1. An abstract must be a fully self-contained, encapsulating description of the document.
  2. It cannot assume (or attempt to provoke) the reader into flipping through the document in question; looking for an explanation of what is meant through a vague statement.
  3. It must make sense all by itself.
  4. Think of a half dozen keywords to incorporate into your abstract…think of what the readership might use!
- We'll share group results after we're finished!

How does usability assist your counter culture?

- Short-term benefits
  - Document is more interactive and "brought to life" with usability features
  - Assists and bolsters education of new staff — those who typically are the ones at the counter
- Long-term benefits
  - Saves staff time, freeing them to give project deadlines more attention
  - Image…being responsive and effective at the counter helps to eliminate **"THE STIGMA"**
- Cost-effectiveness…helps dept. budget

Good luck! But whatever you do…



DON'T be an EVIL PLANNER (like this guy up here)

Oh yes…and remember this too!

Beware of THE STIGMA!
(oh no, not again!)

Discussion, raffle & wrap-up

- Counter culture: discussion
- Counter culture: what methods do you employ in your office?
- Usability: thoughts/reactions from studies
- Did the exercises reveal any challenges your office is facing with its document usability?
- Any “war stories” to share?

Thank you! More details are in the brochure & visit the blog.

town planning | technical writing | document usability

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