To:	Katog Choling—Cynthia Pitchford; Paloma Lopez Landry; Caitlin Grussing; Wyk Parish
From:	Tenzing Briggs *TB*
Subject:	Proposal for Continued Work on Katog Choling Style Guide for RHET 5322
Date:	7 March 2023

This memo will cover the planned process for my work with the nonprofit client Katog Choling, namely, the new sections to be added as an update to the style guide I created last semester (e.g. late December 2022).

Analysis of Client's Materials & General Needs

This section briefly covers Katog Choling's needs, as the document(s) I will create for them reflect them in general. Katog Choling is a nonprofit religious organization, serving as the foundation for Khentrul Lodrö T'haye Rinpoche's dharma activities. Katog Choling primarily helps fund activities at and publish materials on his two primary retreat centers: his family monastery Mardo Tashi Choling in Tibet and the US retreat center Katog Rit'hrod in rural US Arkansas. The organization regularly publishes website materials, such as informational pages on Buddhism and the Katog lineage or schedules of teachings and lectures taking place in the US, Canada, Australia, and online; the organization also publishes print materials, such as Tibetan prayer booklets or shrine booklets.

Because Katog Choling is primarily run by volunteers, no current style guide existed uniting all of its different publications and their various style conventions, until work on this project was begun last semester. Thus, Katog Choling's materials need to each be outlined on their own *but* in a way that can cover shared conventions or methods of publication and that can teach new writers in the organization how to navigate the relevant software and website coding.

Document's Purposes, Readers, and Uses

This project will culminate in a new revision of Katog Choling's style guide, which was created in a previous semester. As a style guide, this document, then, has a very specific and streamlined set of purposes, readers, and uses. Its readers will be people in the organization who are learning how to format and write content for the organization; its purpose will be to aid this process, and it will be used as a reference for when the organization wants new volunteers to continue ongoing projects or for when the organization is deciding the formatting for new projects. Considering this usage, the document's purposes are two-fold: it will teach new members of Katog the organization's usage and formatting (i.e. rules of hyphenation and numbers), but it will also teach new members how to use relevant applications (i.e. Wordpress and InDesign) so that they can successfully input such formatted content into the right applications.

The style guide created last semester covered formatting for the website and some in-house shrine materials; work this semester will add more sections for a specific set of prayer booklets currently being developed in Adobe InDesign and will add more content into the website sections written last semester.

Document's Strengths & Weaknesses, or Room for Improvement

The main current strength of the style guide is that it separates the formatting of different, independent projects and publications, while in its appendices supplying general style guidelines (especially spellings) and supplying examples. However, there is a glaring weakness, which work this semester will address: with the organization's full scope of publications—several of them still being developed, such as the website's online courses—there are simply sections not present in the guide that should be. Moreover, the section on website formatting is incomplete, partially because a large part of the new site is the online courses still in production—material that requires a unique combination of unique formatting (i.e. managing learning management software, or LMS) and of specification (since courses will tend to vary in structure).

Analysis of Editing Goals

Following such weaknesses in the style guide version created last semester, the primary editing goal is to add a new section for the most current and close-to-release project: an Adobe InDesign redesign of Katog's *pujas* practice prayer booklets. Because the style guide seeks to both describe style and teach design formatting, this will section will be two-fold: the main part will describe the stylistic conventions (i.e. typefaces, fonts, and page layouts), followed by another supplementary part teaching how to navigate InDesign to implement these conventions. The secondary editing goal is to refine some of the material already in the guide, such as adding to the current section on the website layout or adding graphics which visually represent spatial formatting (for the the material already in the guide and for the Adobe InDesign redesign section alike).

Management Plan for Style Guide Update

Management of the project will involve several Katog Choling staff members. Caitlin Grussing will be consulted for the creation of the sections on the new prayer booklets and on the usage of Adobe InDesign. Wyk Parish will also be consulted for Adobe InDesign usage, as well as for the additional material to be added to the current section on the website's formatting.

A main difference to the management of the work from last semester is that this continued work will have several deliverables: 1) a document containing all the new material developed and edited, primarily the new sections and any new graphics, 2) a new revised style guide, incorporating all material from this semester *and* last semester, and 3) a version of the revised style guide with track-changes for the edits, for ease of review in the proofreading stage. These deliverables will be sent to Caitlin Grussing, Wyk Parish, Cynthia Pitchford, and Paloma Landry, as well as any other members at request.

Organizational Plan for New Style Manual Sections

The rough organization of the new section for the style manual will be as follows:

A. InDesign print prayer booklets

    a. InDesign Teaching & Tutorial

        i. Importing Fonts

      1. Tibetan script font download

   ii. How to create styles

      1. Paragraph styles

      2. Character styles

   iii. How to create master pages

      1. Insetting images

      2. Setting paragraph and character styles

   iv. Editing individual pages

      1. Changing individual pages styles formatting

      2. Avoiding global changes

 b. Booklet Layout

   i. Font and Character styles

      1. Tibetan script

      2. English transliteration

      3. English translation

      4. Spacing between different character styles

   ii. General page layout

      1. Text box placement

      2. Image placement

   Additionally, the current "Digital Style" chapter will have the following new or edited sections (with asterisks highlighting edited old sections and all else being new sections):

B. Digital Style*

 a. Wordpress Layout*

   i. Recordings layout*

   ii. Video layout*

 b. Mailchimp Layout*

   i. Creating Templates

        ii.   Choosing Templates

C. Appendix A – Shrine Book Front and Back Covers*

D. Appendix B – Style Sheet*

E. Appendix C – Layout of Base Website Logos and Illustrations*

Work Schedule/Milestones
A rough outline of milestones is as follows:

A. Already met:

    a. Saturday, February 11th—Met with Caitlin on the InDesign *pujas* project

    b. Monday, February 20th—Met with Wyk on editing website sections

B. Week of March 6th through through 12th:

    a. General week work—Begin drafting new graphics for visually showing formatting (old material + the different master templates in the InDesign project)

C. Week of March 13th through 19th:

    a. General week work–-Start section on navigating/learning relevant InDesign

    b. Saturday, March 18th—Finish section on navigating/learning relevant InDesign

D. Week of March 20th through 26th:

    a. General work—Start section on specific InDesign project style

    b. Saturday, March 25th—Finish section on navigating/learning relevant InDesign

E. Week of March 27th through April 2nd:

    a. General work—Start new sections + edit old sections from digital style section

    b. Saturday, April 1st—Finish all MailChimp new sections

F. Week of April 3rd through 9th:

    a. General work—Review old material for any new edits needed

    b. Friday, April 7th—Progress report on what's finished + what's still being worked on

G. Week of April 10th through 16th:

    a. Friday, April 14th—Finish "out the door" draft of first deliverable (new or edited sections)

H. Week of April 17th through 23rd:

    a. Monday, April 17th—Meet with Caitlin over InDesign section draft

    b. Wednesday, April 19th—Meet with Wyk over InDesign section draft

    c. Friday, April 21st—Meet with Wyk over website new and edited sections

I. Week of April 24th through 30th:

    a. Tuesday, April 25th—Give graduate presentation on the project's editing process

    b. Friday, April 28th—Finish and send to both Katog Choling and Dr. Nahrwold last two deliverables (completed full style guide + a version with track changes)

This concludes all current plans for the project; please let me know if you think this outline of milestones seems reasonable given the time constraints, especially in terms of having a good date for the progress report and enough time to review the first draft. I look forward to your comments.

Sincerely,
Tenzing Briggs