

Recommendations and Lessons Learned from the Completion of an ASHRAE Special Publication

Prospective and approved authors of ASHRAE Special Publication projects may find the following recommendations and lessons learned, supplied by a published ASHRAE book author, helpful.

Recommendations

1. It is important that the project starts with a **detailed scope** of the purpose of the book. This includes **the audience** the book is written for.
2. **Team members should carefully be chosen.** It is recommended the team consists of no more than 5 or 6 members. Any more members could cause the project to be extended. In the case of a design guide, it is recommended to have:
 - a. 3 producers (an odd number in the event of a vote)
 - b. 1 practicing engineer who is an expert on the guide's subject
 - c. 1 test and balance contractor who has experience in the guide's subject
 - d. 1 manufacturer's representative who is aware of the issues of the productEach of the primary team members can include input from other sources. These sources would be mentioned as contributors in the guide, but not as primary authors.
3. The project should begin with a **detailed outline of each chapter** and what is included in the chapter. The team should assign each item on the outline to a member to complete. Writing should not begin until the outline has been thoroughly reviewed by the team and each item has been assigned. The outline should not be modified without a vote to approve by the team.
4. An **indexed numbering system** should be used so when discussing or reviewing with the team, the section is easy to identify. The numbered sections also will help the team discuss the guide with the ASHRAE editor.
5. A **meeting schedule** for the entire project should be developed to begin the project. This will ensure that all the team members are aware of the time and travel commitments.
6. **Assignments were critical.** Each member of the team had an assigned chapter and a date for completion. If a member fails to meet their commitment, they should be aware another person can take their place. An incentive to meet assignments is that if someone is removed from the team, they will not get credit on the guide as an author.

Lessons Learned

7. **"Feature creep" was an issue.** The problem is that we always wanted to continue to add subjects and topics. We found to get the project done you need to start with a detailed outline and stick with it until the project is complete. For future projects, I would highly recommend that the authors spend significant time to develop a very detailed outline for what is in the guide.
8. **SI units were an issue.** I would recommend that future projects add the SI units as the text is developed. We originally thought that ASHRAE would take care of SI conversions and found this to be false. We ended up adding SI conversions at the end of the project, which turned out to be very time consuming.
9. **Getting written approval to use a graph or photo was an issue that caused some delay.** ASHRAE has permission forms that need to be completed by the publisher of the source of the material.
10. **References should be cited as the guide is written.** It was time consuming to go back and make sure references that were used in the guide were cited.
11. **ASHRAE did the editing and wordsmithing of the final draft.** We learned that ASHRAE was excellent to work with but their resources are limited, so we should have added extra time for the final editing.