

# STEPS & SPECS

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The newsletter of the STC Policies and Procedures Special Interest Group

March 1997

## ***Informal Benchmarking Study Highlights Similarities and Differences***

by *Jerri L. Houdayer*

The results of an informal benchmarking study by my employer, McDonnell Douglas, yielded several common elements and some striking differences in the ways that various West Coast companies and institutions handle the documentation of policies and procedures.

Impetus for the study comes from McDonnell Douglas' review of its policies and procedures (P&P) development process and a desire to learn about the practices of other companies in other industries.

As a member of the documentation team at McDonnell

Douglas, I was asked to conduct the survey, using as resources fellow members of the Society for Technical Communication (STC) and its Policies and Procedures Special Interest Group.

Six industries were represented in the study: aerospace, food service, banking, manufacturing and education. An STC member was sought as a contact at each company or institution.

### ***Methodology***

The survey was conducted from September 1996 through January 1997. One or more con-

tact persons were identified at each site.

Telephone interviews were held with each contact to ensure that the processes under review were common among the selected companies. Interview questions were provided to each contact, with opportunities for further discussion before the scheduled interview.

Interview data were summarized and provided to each contact and to members of the P&P SIG and the McDonnell Douglas

*See BENCHMARKING, p. 2.*

## ***PIC Name Changed to SIG by Unanimous Vote at Society's Winter Board Meeting***

by *Audrey Cielinski Kessler*

The story you are about to read is true. The name has been changed—but not to protect the innocent. It was changed to enhance the visibility and recognition of the Society for Technical Communication's professional interest committees (PICs) by adopting the more widely understood and accepted term for such groups: special interest group, or SIG.

The change was approved by a unanimous vote at the STC board meeting in January.

For 18 months, STC's PIC Advisory Committee researched

and discussed the issues and alternatives regarding a long-term strategy for developing and managing the Society's PICs.

Two main concerns brought the issue of a name to change to the forefront. Many people outside the organization did not understand why STC used the term PIC when SIG is understood and accepted in the greater business world and within other professional organizations.

A related issue was the mixture of groups called PICs at the Society level and both PICs and SIGs at the chapter level—with

only a general sense of how the groups relate to each other. ↗

***Audrey Cielinski Kessler*** is the owner of *The Write Hand*, an editing and desktop publishing company in Kent, Ohio, and a member of the Northeast Ohio chapter of STC.

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## BENCHMARKING

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### Policies and Procedures Documentation Council for review.

After authorization from the contacts and the P & P SIG, a grant proposal based upon this review will be submitted to the STC office.

### Similarities

P & P usage is becoming more important in today's marketplace. It seems that because of downsizing, the streamlining of companies and the need to perform better and smarter, the use of consistent, standard, documented processes are ever more necessary.

Distribution methods are moving slowly to electronic means. Although most companies want to be online tomorrow, most were in the initial

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***Distribution methods for P&P documents are moving slowly to electronic means, with most companies surveyed being in the initial stages of the transformation.***

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stages or were moving from a legacy system to either a client-server environment or an Internet/Intranet environment.

The writing of P & P documents is done primarily in Microsoft Word. Some companies are converting Word documents into a secondary data format for viewing and distribution into unique systems or into HTML format for use on the Worldwide Web. Several compa-

nies were converting from Macintosh systems to IBM-type systems, though none were moving from IBM to Macintosh.

Documentation content is becoming the responsibility of the process owner, who is making more decisions regarding content, format and the update schedules. In the past, writers coordinated much of the document content. This responsibility appears to be shifting to the process owner.

### Differences

Distribution methods varied according to the resources available and the needs of the user. Methods varied from the daily uploading of Microsoft Word files to a LAN, to paper-copy distribution three to four times per year.

The format of P & P documents were unique to each company. Many of the companies interviewed do not centralize the publication of P & P documents within divisions of the company. There appears to be no generic or standard P & P writing style or format.

The perceived need for policies and procedures varies among and even within the companies interviewed, with no apparent variable to explain the difference. Some groups devoted extensive resources to P & P documents while other divisions in the same company had zero resources.

Also varying among the subject companies was the location of the policy and procedure reporting structure. Centralized P & P functions report variously to the following departments: law, human resources, business operations, quality control and facilities.

### What's Next

Now that the results are in, the next step is to evaluate several of the options that emerged from a review of the data and determine which should be adopted or studied further. 

***Jerri L. Houdayer is a member of the Orange County chapter of STC and heads the Programs and Projects team for the Policies and Procedures SIG.***

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## **P&P SIG Membership Continues to Grow**

by Jerry Laing

Membership in the P&P SIG continues to grow, although not at the rapid rate of last quarter.

From November through January the SIG gained 17 new members. As of January 31, total membership is 332.

A warm welcome is extended the following new P & P SIG members:

- **Martin Bagno** (NY)
- **Teresa Bricker** (OR)
- **Rivka Buchanan** (Canada)
- **Suzanne Ferrell** (CA)
- **Lee Ann Feltwell** (PA)
- **Tim Wicks-Frank** (OH)

- **Kimberly Gay** (CA)
- **Elizabeth Hennessey** (IL)
- **Roberta Henson** (TX)
- **Lyn Joyner** (TN)
- **Will Kelly** (VA)
- **Michael Manning** (CA)
- **Don Manuel** (Canada)
- **Salan Pazurik** (Canada)
- **Aimee Porter** (SC)
- **Candace Redmond** (NY)
- **Elizabeth Reed** (MD) 

*Jerrold A. Laing is P & P SIG Membership team leader and a member of the San Gabriel (CA) chapter of STC.*

## **P&P Sessions Set for STC Annual Conference**

by Audrey Cielinski Kessler

An eight-topic progression is among the policies and procedures (P & P) offerings scheduled for the STC conference in Toronto May 11-14. A special interest group (SIG) networking luncheon and a SIG meeting also are slated.

The following is a list of the P&P attractions at this year's conference:

- *A Policies and Procedures Progression* (Tuesday, May 13; 10:30 a.m.-noon). Presenters are SIG members **Jerri L. Houdayer, Raymond E. Urgo, Donald Robert Kirtland, Kathleen B. Craddock, Ronnie L. Cantor, William H. Darnall, Cheryl Hultquist and Michelle E. Anderson. Houdayer**, the SIG's Programs/Projects team leader, also will serve as moderator.

- SIG Networking Luncheon (Sheraton Hall; Wednesday, May 14; noon-2 p.m.)
- Conference Networking Luncheon (Grand Ballroom; Monday, May 12; noon-2 p.m.). A P & P table will be available at this luncheon for questions and information about the SIG
- SIG Business Meeting (Sheraton Hotel; Sunday, May 11; 3:30 p.m.-5 p.m.)
- *Flowcharting Processes and Procedures* (full-day postconference session; Thursday, May 15; 8:30 a.m.-5 p.m.). Presenter is SIG manager **Raymond E. Urgo**. 

*Audrey Cielinski Kessler is the owner of The Write Hand, an editing and desktop publishing company in Kent, Ohio, and a member of the Northeast Ohio chapter of STC.*

## **SIG Receives Average of One P&P Information Request Each Week**

by Raymond E. Urgo

During the first two months of 1997, the P & P SIG has received an average of one request per week for information or assistance—twice the number received during the same period last year.

Most of the requests so far have come from fellow SIG members and originated from seven states.

Persons contacting the SIG sought information on matters such as the following:

- Marketing and the transition of talents for P & P opportunities
- Organizing P & Ps in large corporations
- Addressing concerns about P & Ps in multinational corporations
- Evaluating software for taking P & Ps online
- Justifying an increased P & P budget for the organization

Special thanks to those SIG members to whom requests for assistance were referred.

If you are a member who sought assistance, please drop us a line to let us know who was helpful and what you learned so that others may benefit from your experience. We will be happy to publish your letter or article in this newsletter.

**Raymond E. Urgo** is principal of Urgo & Associates, a member of the Los Angeles chapter of STC and manager of the Policies and Procedures SIG.



***Q What, if any, are the required sections of a software procedures manual? Are there any optional ones?***

**A** A software manual that adequately communicates the intended information typically contains the following sections presented in the order given here: table of contents, introduction, system overview and information flow. The inclusion of other sections, such as functional input, screen format and sequence and reports, depend on the nature of the procedures

being documented. Optional sections include special features, basic terminology and concepts, glossary, controls, appendices, and an index.

***Q What information should I include in the Introduction section of a procedure manual?***

**A** Typically you would want to include the following items: a brief statement of purpose and function; the relative place and importance of the procedures in the company's struc-

ture; a tutorial on the general subject matter the procedures document; how the manual is structured, formatted and intended to be used; and whom to contact if questions about the manual arise. For the contact person, you may want to use a position title rather than a specific person's name. That way, if the person leaves that position, you don't have to revise the manual to reflect the new person's name. Finally, be sure to keep the introduction brief, generally no more than one and one-half pages.

*Note: Compiled by Audrey Cielinski Kessler, editor of STEPS & SPECS, the owner of The Write Hand and a member of the Northeast Ohio chapter of STC.*

## **STEPS & SPECS**

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*The mission of the Policies and Procedures special interest group is to assist STC members in developing, implementing and managing policies and procedures communication through educational and networking opportunities, STC conference sessions and publications, and communication with other STC PICs and professional organizations in areas of common interest.*