STEPS & SPECS

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STC

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SIG Testing New Member Interest/Volunteer Sign-Up Cards

By Joy Osaka-Lu

Last year, our SIG manager, Audrey Cielinski Kessler, and I developed a P&P New Member Interest/Volunteer Sign-Up Card in order to gauge new members' interests and professional experience.

Every SIG relies on its members to share their experiences and insights into professional trends. We thought the cards were a good way to track our members' dynamic interests and willingness to help with current or future team projects. To reach new members, a sign-up card is included with the P&P SIG new member packet. A welcome letter and the latest issue of the *STEPS & SPECS* newsletter is also included.

Between October and December 1998, 125 cards have been sent. The response rate has not been as enthusiastic as expected, so I wanted to share some background information on the concept of the card to encourage member participation.

The 4" x 6" card is divided into three sections to allow members to specify:

- Personal data
- Interest in five listed P&P teams (Membership, Public Relations/Web Page, Programs & Projects, Newsletter)
- Comments/feedback

As a Membership team member, I prepare and send the monthly P&P SIG new member packets. I am always impressed with the variety of companies that employ our members and often wonder how policies and procedures documentation fits into their daily routine. With such a rich and diverse pool of professional backgrounds, it would be interesting to hear from you.

Here are a couple of ways to get involved: Offering an hour or two each month to work with any of our team leaders–volunteering is fun and painless (really!). Writing a short article for our newsletter is another idea–it can be as simple as outlining a specific P&P issue in your industry or sharing a solu-

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Go With The Flow (or Not!)

By Kim MacMillan

Picture us, a technical writer and a group of electrical engineers closeted for days on end in a small, darkened room determined to develop the best electrical troubleshooting procedures you've ever seen.

We began using flowcharts but later abandoned them in our quest for the perfect troubleshooting manual for electricians who repair electrical equipment on the highways of lower mainland British Columbia, Canada. Our manual was to tell the electrician how to get to the bottom of a fault (i.e., a burnt out traffic light) and then fix it. We had to describe 75 faults ranging from the simple burnt out bulb to more complicated problems involving power supplies and computer networks.

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Inside . . .

P&P Progression Scheduled for STC Annual Conference

By Michelle Anderson

If you're attending the STC International Conference in Cincinnati this year, you won't want to miss the P&P progression tentatively scheduled for Wednesday, May 19 from 2-3:30 p.m. It's titled "Writing Policies and Procedures Documents."

Policy and procedure experts from the United States and Canada will discuss topics including writing styles, strategies for acquiring source information, protecting a company's image and maintaining document authenticity on an Intranet.

The session presenters are as follows:

Moderator: Leanne Logan, Quarry Integrated Communication.

Leanne is an active STC member. She is past-president of the Southwestern Ontario Chapter, served as the TR stem manager for the 1997 STC Annual conference, and is a Canadian Issues Committee member.

Speakers:

Audrey Cielinski Kessler, The Write Hand. *Documenting Procedures after the Sole Subject Expert Has Left the Organization*

This presentation will relate Audrey's experience writing personnel procedures for a non profit counseling agency where the primary "source document" was absent.

J. Richard Fleming, System Planning Associates, Inc. *Writing Clear Policies and Procedures with Playscript*

The Playscript procedure writing style is well known for its plain language characteristics and excellent readability. This presentation will examine Playscript elements and illustrate how these design characteristics have been translated into a policy style with a common appearance.

Stephanie H. Copp, CIBC. *Publishing Policies and Procedures on an Intranet*

Policy and procedure writers face special challenges when they start distributing their materials via an Intranet. This presentation will also discuss maintaining print and online copies and automating the process.

Elizabeth R. Turpin, Ph.D., Ferris State University. *Policies and Procedures for Protecting Image and Accuracy in Company Publications*

This presentation outlines publication policies and procedures to help prevent embarrassing mistakes that can damage corporate image or have other negative effects.

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We started the manual using flowcharts to describe and illustrate the troubleshooting procedures. Through a series of meetings, I sketched the flowcharts while the electrical engineers worked out the procedures. The flowcharts were projected with an LCD panel so the engineers could review and revise their ideas as we worked. By the end of the first draft of the flowcharts, we realized that flowcharts and our electricians would not be effective:

- Some of the equipment that we were writing about was new to the electricians, and they had received limited training on it.
- We needed to give the electricians relevant information about the new equipment right in the troubleshooting procedures, and there wasn't room in a flowchart to do that.
- A flowchart implies that troubleshooting has to be carried out exactly in the order shown, but that was not true for all. Troubleshooting is an art that is sometimes best accomplished by trying a bit of this and a bit of that. We didn't want to affect the process by imposing structure where it was not required.
- All of the information in a flowchart appears equally important. It is difficult to highlight and lowlight information of varying degrees of importance.
- All of the information in a flowchart appears equally precise. When we established a level of precision that was suitable for the average electrician, we found a "catch 22." The flowchart was too complicated for most electricians.
- The flowcharts did not allow us to demonstrate the principles behind the troubleshooting procedures. Most users get better results if they have the "why" as well as the "what."

Despite the evidence before us, we did not aban-

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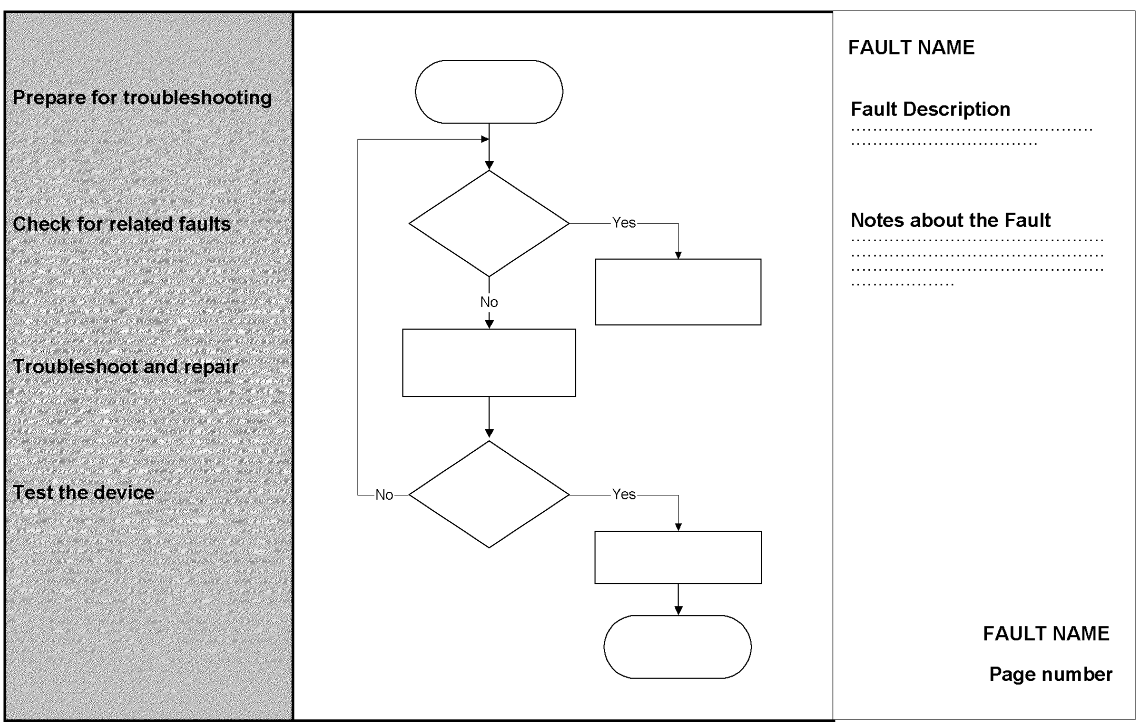

Figure 1. *This figure represents a simplified version of the layout that we created to overcome the shortcomings of a traditional flowchart. We used 11" x 14" paper to get all the information on one page. The center panel contained the flowchart itself. The left panel contained headings that marked the start of a new process in the flowchart, providing a "big picture" for both experienced and inexperienced electricians. The right panel contained details and background information about the process that did not fit in the flowchart. Due to the size of the page, we found that navigation through the document was easier if the fault name was at the bottom of the page, as well as at the top.*

FLOW
Continued from p. 3

don the idea of flowcharts. Instead we experimented with ways to accommodate the shortcomings of the traditional flowchart and came up with the design shown in Figure 1.

The new design looked great and addressed most of our original concerns, but it also raised some new ones. We would have to fuss with page layout, taking considerably more time to create and maintain the document. The manual would be so large that we couldn't easily use Word, our customer's tool of choice. We would have to use 11" x 14" paper. Also it is one thing to throw a flowchart together for discussion in a meeting and quite another to make it fit for publication.

At this point, we settled for the text solution shown in Figure 2.

The time spent developing the flowcharts was not wasted. We had to develop the content, and the visual nature of flowcharts allowed us to push the ideas around quickly. The flowcharts also made us think logically and in great detail. They made us recognize the difference between procedures that demanded precision and those that did not. I am convinced that had we used text from the start, we would have been focused on getting the words just right rather than concentrating on ideas and process.

***Kim MacMillan** is a self-employed technical writer who has just moved coast to coast from Victoria, British Columbia, to Halifax, Nova Scotia. In the past few years, she has specialized in manuals relating to electrical and highway engineering and traffic management. Kim is a charter member of the Vancouver Island Chapter of the STC and served two terms as its president.*

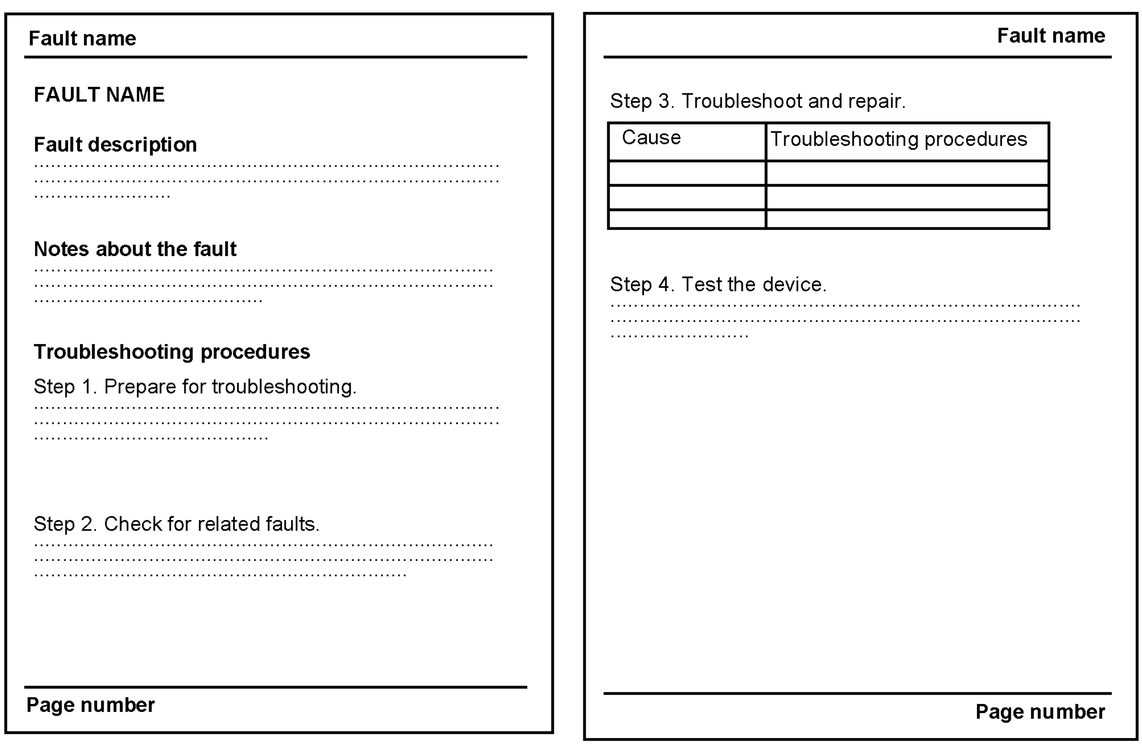

***Figure 2.** This figure illustrates how we transformed the flowchart into text. The "big picture" headings in Figure 1 became numbered steps, indicating that adherence to order was required. The nitty-gritty troubleshooting procedures went into a table. These procedures were not numbered, giving the electrician subtle permission to tackle the problem in his (or her) own way. The procedures were not randomly ordered. They were listed from easiest to check to most difficult to check so that an electrician trying all the options from top to bottom would have the most efficient path through the problem. With this format, we had to use two pages rather than one.*

SIGN-UP
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tion to a problem you recently encountered.

Even if you can't actively participate in the P&P SIG at this time, please return the card to let us know what issues you are most interested in. If you're an existing member, we'd like to hear from you, too. You can send your comments to Audrey Cielinski Kessler at **AudCK@aol.com**, (330) 677-8598 (phone and fax).

Policies & Procedures SIG

Membership Interest/Volunteer Sign-Up Card

Name: ____________________ Email: ____________________

Address: ____________________ Phone (W or H): ____________

____________________ Fax: ____________________

Yes! I'd like to help with the following items:

_____ Membership _____ Programs & Projects

_____ Public Relations / Web Page _____ Newsletter

_____ I can't help now but keep me in mind for future projects

My areas of interest in P&P are: ____________________________

My areas of P&P expertise are: ____________________________

I would like to see or write newsletter articles about: ____________

____

Other comments: ____

____

P&P Happenings

Introduction to Policies & Procedures Communication.
University of California,
Los Angeles Extension

Instructor:
Raymond E. Urgo, principal,
Urgo & Associates,
Los Angeles

Dates:

April 17

May 1

For more information, please contact UCLA Extension at (310) 825-4192 or **http://www.unex.ucla. edu**.

How to subscribe to the LISTSERV

The P&P SIG LISTSERV is available to all P&P SIG members. If you have an idea, question or comment that's important to you, share it with your fellow P&P professionals by posting it on the SIG's LISTSERV.

To subscribe to the P&P SIG LISTSERV, send an e-mail message to **majordomo@stc.org**. In the body of the e-mail, type the following: subscribe stcppsig-l <your e-mail address>.

To post a message to the list, address your e-mail to **stcppsig-l@stc.org**. Specify a subject, and type your message in the body.

Deadline for the June1999 issue:
May 15!!!

Please email Michelle_1962@yahoo.com with articles

CONFERENCE
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Jerri Houdayer, Boeing Commercial Airplane Company. *Maintaining Policy and Procedure Authenticity on an Intranet*

Jerri is the Intranet manager for the Douglas Products Division of Boeing Commercial Airplane Company and will be discussing P&P maintenance on an Intranet.

Raymond E. Urgo, Urgo & Associates. *Contracting and Consulting for Policies and Procedures Engagements*

This presentation will focus on levels of service, growing areas, development techniques, specialization and networking as it applies to P&P engagements.

Also try to attend Raymond's post conference seminar titled "Fundamentals for Flowcharting Processes and Procedures." It is tentatively scheduled for Thursday, May 20, 8:30 a.m. to 5 p.m.

Please check the STC web site for the latest conference information. The URL is **http://www.stc-va.org/46th/46frame.htm.**

Editor's Note

The conference listing for J. Richard Fleming's presentation in the December issue of STEPS & SPECS was incorrect. Mr. Fleming's topic will be called "Writing Clear Policies and Procedures with Playscript." We regret the error.

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 communications through educational and networking opportunities, STC conference sessions and publications, and communication with other STC SIGs and professional organizations in areas of common interest.