

### Additional Conference Presentations Related to Procedures Communication

Compiled by Kathy Craddock

In addition to the conference sessions presented by SIG members, the following sessions related to procedures communication will be offered at the annual conference:

#### Tuesday, May 15

##### **ID 5Q Humanistic and Cognitive Traits of an Information Designer –**

The need for stronger evaluation criteria for hiring information designers led to an innovative definition of their skill set. In this session, presenters show that achievements, self-esteem, and mental modeling came out on top.

##### **ID 6R Bite the Bullet: Make Your Presentation Shorter and Better –**

If you are new to making digital presentations, or want to make them better, this workshop is for you. This

workshop will show how to apply principles in information design to current presentation software.

##### **ID 7E Tapping into Creativity –**

Information designers are continually faced with the challenge of finding creative information solutions. In this workshop, participants will discover ways to unlock their creative talents to enhance products and processes.

#### Wednesday, May 16

##### **WE 11R Rulemaking, Public Policy, and Regulatory Writing –**

Agencies are rewriting regulations for clarity and better understanding. This panel discussion examines these changes and how they affect communicators.

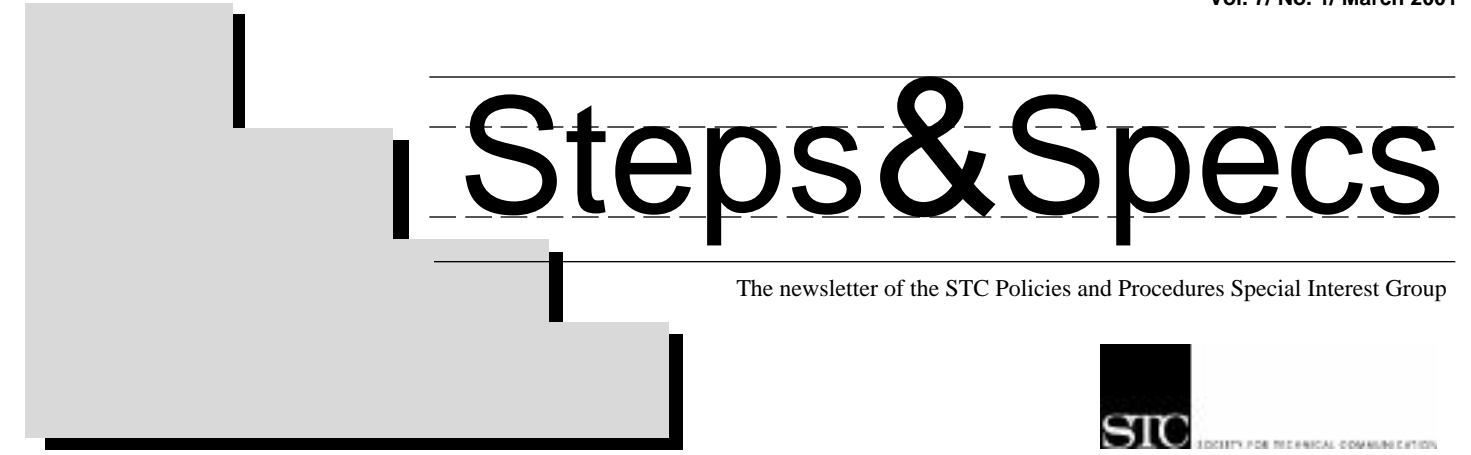
### Coming in June

Watch for follow-up information about the Policies and Procedures SIG and its participation at the STC 48th Annual Conference. The June issue of *Steps & Specs* will have information about the SIG's annual business meeting, plans for the upcoming year, SIG members and a wrap-up of our participation at this year's conference.

All coming in June!

*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 SIGs and professional organizations in areas of common interest.*

*Steps & Specs*  
Kathy Craddock, Editor  
103 Blueidge Rd.  
Carrboro, NC 27510



The newsletter of the STC Policies and Procedures Special Interest Group



## The Effective and Judicious Use of Graphic Elements in P&P Documents

By Audrey Cielinski Kessler

My take on the use of graphic elements in policy and procedure documents is based on the premise that people are more likely to look at the pictures than read the text portion of a document—regardless of whether that document is a user guide, a policy manual, a newspaper or a magazine.

Because of this propensity to favor pictures over text—especially lengthy text—it's important that graphic elements—from charts and graphs to tables and diagrams—be used both effectively and judiciously. So what is meant by “effectively” and “judiciously”?

“Judiciously” means using the type of graphic element that is best suited to the nature and purpose of the document and the composition of the audience. It does not mean adding graphic elements just to have them or to fill up space so the document is longer and perhaps (at least to some) more impressive because of its heft. It means using graphic elements to enhance the document user's ability to perceive and comprehend the intended message. Even the most technically correct document is of little use if its message is not conveyed to the persons to whom the message is addressed.

“Effectively” means using graphics that are self-contained and can stand alone on their own merits, without the reader

having to plow through rows of text to find even basic information about the graphic, such as units of measure, the meaning of symbols or abbreviations, or a title other than just “Figure 3” or “Table 1” (see Figure 1 on page 8). It means using a descriptive, substantive and inclusive title with the graphic and presenting the information clearly and obviously (see Figure 2 on page 8). The goal is to make it unnecessary for the reader to have to skim or read word for

*Even the most technically correct document is of little use if its message is not conveyed to the persons to whom the message is addressed.*

word the accompanying text. Chances are, the user won't bother—which means your message, despite its importance or value to the user—may not be communicated. With an outcome like that, both you and the reader lose. You have wasted your time because your message failed to be conveyed; the user wasted his time because the information he was seeking remains elusive.

The judicious and effective use of graphics also has to do with the placement of the graphics within the

text and references to the graphics in the narrative portion of the document. The existence of the graphic needs to be referenced in the text with the related graphic placed as close to that reference as possible. The reader should not have to flip several pages before finding the referenced graphic. That's wasted time for the reader and disruptive of the thought process. That's not to say that a graphic must be on the same page as its text reference. It only means that the reference and the graphic need to be in close proximity to each other.

But don't assume that because the reference and the graphic are close

*Graphic Elements, continued on page 8*

#### In This Issue:

<i>The Effective and Judicious Use of Graphic Elements in P&amp;P Documents.....</i>	<i>1</i>
<i>From the Editor's Desk .....</i>	<i>2</i>
<i>Manager's Column.....</i>	<i>3</i>
<i>Your Turn.....</i>	<i>3</i>
<i>Book Review.....</i>	<i>4</i>
<i>P&amp;P SIG In Chicago.....</i>	<i>5</i>
<i>Member Profile.....</i>	<i>6</i>
<i>Membership Matters .....</i>	<i>9</i>
<i>Help Wanted .....</i>	<i>10</i>
<i>Tips for Making the Most of STC 48th Annual Conference .....</i>	<i>10</i>
<i>Down the Lazy River.....</i>	<i>11</i>
<i>Procedure Related Sessions .....</i>	<i>12</i>

## From the Editor's Desk

By Kathy Craddock

Spring is here, and I'm glad! It's time to shake off those winter blues and get busy. This issue of *Steps & Specs* focuses on the upcoming STC 48<sup>th</sup> Annual Conference. I'm happy to report that the Policies and Procedures SIG will again be active at this year's conference. We have a lot planned and hope to meet many of you.

Included in this issue is a list of the policy- and procedure-related sessions at the conference with brief descriptions about each one, and their times, locations, and fellow members who will be presenting. Remember that there may be program changes between now and May. Check your final program when you arrive in Chicago for any last-minute information.

Meet Heather Brown-Palsgrove in our **member profile**. Heather has provided us with a quick and easy guide of what to do in the downtown Chicago area if you have any energy left after the conference sessions.

The SIG membership report shows how our membership has grown, while the SIG manager's report stresses that volunteering is vital to the life of such a group.

There are volunteer opportunities, a book review, hints and tips from your peers, and another topic of discussion for the June issue. Let us hear from you!

Finally you'll see tips and hints on how to make the most of the conference whether you are a first-time attendee or have attended for several years. Don't forget to stop by the SIG's business meeting at the conference. It will give you a chance to meet your SIG leaders and other SIG members.

### Policies and Procedures SIG Business Meeting

The P&P SIG business meeting occurs each year during the conference. This year, the SIG's

business meeting will be held on Tuesday, May 15 from 7:15 a.m. until 8:15 a.m.

The meeting's location will be determined at a later date and will be listed in the final program.

This meeting gives all SIG members an opportunity to share ideas for the direction of the SIG during the next business year; to meet fellow SIG members and do a little networking; to learn more about how one can become involved in the SIG (there are lots of volunteer opportunities available).

Check the final program for the meeting location, grab some coffee and breakfast from the Riverside Center West, East Tower, Hyatt Regency, and then join other P&P SIG members at the meeting on Tuesday morning.

It's a great way to start your involvement with the P&P SIG. **We'll be looking for you and eager to hear your ideas.**

See you in Chicago!

*Kathy Craddock*

### Upcoming . . .

#### STC to hold telephone seminar on "Managing Documentation with Humor and Grace"

STC will hold a telephone seminar on "Managing Documentation with Humor and Grace" on April 18, 2001, 1:00 p.m. - 2:30 p.m.

Doreen A. Mannion will present the seminar. Mannion is an award-winning author, manager for the management and professional development stem of STC's upcoming annual conference, and has worked as a stand-up comedienne.

For details, including an explanation of how telephone seminars work, please visit [http://www.stc.org/seminar\\_managing.html](http://www.stc.org/seminar_managing.html).

For information about STC, please visit <http://www.stc.org> or call 703/522-4114.

*P&P SIG, continued from page 5*

**Wednesday, May 16, 8:30 - 10:00 a.m. WE 9U Policies and Procedures Writing: It's Not Just for Software and Hardware Manuals Anymore** – In this panel discussion, representatives from nontraditional policy and procedures areas tell what they do and how they fit into a field that is often associated with hardware and software manuals. Learn also about the subject-matter options for technical communicators who would like to pursue a career in a nontraditional area of policies and procedures.

**Session Moderator:** Victoria Sharpe  
**Panelists:** Rebecca Goodwin Deardoff, Carol Hoeniges, Kathleen Craddock, Luette Arrowsmith.

**Sample Questions:** The following are examples of the types of questions the panelists will address:

How did you get started writing policies and procedures in your subject-matter area?

How does the type of policies or procedures that you write fit with technical communication?

Some might say that the type of writing you do stretches the definition of policies and procedures communication and defines it too broadly. Do you agree, and why or why not?

Has defining yourself as a policy and procedure communicator helped or hindered how others within and outside your organization (employer) view the necessity for and value of the work that you perform? How so?

Join us on Tuesday and Wednesday for these P&P SIG sessions.

## Down the Lazy River - One Panelist's Journey

By Carol Hoeniges

Imagine a towboat with 15 barges looming ahead of it, making slow passage down the Mississippi River. Then try to imagine the same vessel as part of a competitive industry that has economic, environmental and safety concerns to address. It is within this transportation industry that I'm involved as the lead writer in the development of policy and procedures for river barge line companies. At the STC conference in Chicago in May, I will speak about how my company assists in the writing of operations manuals using a participative, team-based process.

Our team is comprised of many salt-of-the-earth, knowledgeable mariners who function in various roles on the vessel and on shore in operations and personnel departments. From captains to shipyard managers, the members of the team actively participate in team meetings and help write their own text. Because they know their procedures best, I work closely with them to identify what work processes are critical to address in the manual. From there, we negotiate the level of detail the procedures will contain, recognizing that on-the-job coaching and other training initiatives are often better suited to handle the overwhelming amount of detail and knowledge needed to complete the job safely and efficiently.

The operations manual we develop functions as a management tool and as a resource for the employee. With their primary medium being paper manuals with frequent updates, we work hard as a team to build the best structure for the document. The team members help me see what makes sense to the user because they are, in fact, the users themselves. This highly interactive level of engagement with team members replaces more traditional methods of interaction with subject-matter experts such as interviewing. As the writer in this process, I become the project leader and information manager, while also building

my skills as facilitator of the team meetings. The returns are outstanding. We not only have a "book" that works but we have also added value through the team's dialogue, calibration, and sharing of best practices throughout the process.

*Carol Hoeniges is a writer with the Hile Group in Bloomington, Illinois, a consultancy specializing in performance improvement and workplace documentation. Hoeniges partners with clients in operations and safety departments to develop various kinds of organizational documents. Hoeniges is a senior member of the Society for Technical Communication and has presented papers on team-based writing process at STC regional and national conferences.*

*Smart Companies, cont. from page 4*

Koloupolos compares three organizational structures: traditional, horizontal and virtual. He views none as "wrong" but emphasizes that any organization must be flexible enough to respond to competitive forces and become "perpetual."

Other books by Koloupolos are *Corporate Instinct*, *The Workflow Imperative: Building Real World Business Solutions* and *Electronic Document Management Systems: A Portable Consultant* (with Carl Frappaolo).

*Gem Smith, a senior member of STC, is a member of the Consulting and Independent Contracting and P&P SIGs. She regularly contributes to Society publications. Her company, Facets Business Communications, offers a variety of business communications services including procedure writing, employee communications and marketing writing.*

**Steps & Specs** is published quarterly by the Society for Technical Communication's Policies and Procedures Special Interest Group.

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## Tips for Making the Most of the STC 48th Annual Conference

By George F. Hayhoe

*The following are excerpts from a post to the TECHWR-L listserv from George F. Hayhoe, May 1999 on how to make the most of the STC 48th Annual Conference and is used with permission.*

Introduce yourself to others at the conference. You will notice lots of others who are there by themselves and would be delighted for you to talk to them.

Chat with speakers and folks active in STC at the Society level. Share ideas with them and get to know those whose names you've seen in publications.

Be prepared to walk farther between sessions than is usual at conferences held in hotel meeting spaces.

Be sure to have a couple of sessions picked in advance for each time slot, since some may be filled before you get there. Be aware that there are changes between the preliminary and final programs.

A good supply of business cards is a must.

Stay at the conference headquarters hotel if you can, and go to as many of the meal events as possible to socialize and network between sessions and after hours. The free welcome reception buffet Sunday night is usually a more than adequate substitute for dinner, and the breakfast buffet each day is also included in your registration. The three networking lunches (served at the table, ordinarily) require an additional fee, as does the Tuesday night honors reception and banquet, but the costs are reasonable.

Dress has usually been businesswear, though there is a trend to business casual. Be sure to wear comfortable shoes.

As for evening events, there is the free welcome reception on Sunday, the free regional receptions on Monday, Monday Night at the Field Museum (ticketed), and the honors banquet (ticketed) on

Tuesday. It shouldn't be difficult to make plans for post-reception or post-banquet socializing at those functions. Be prepared to learn a lot, to meet a lot of new and interesting people, and to get a fresh perspective on our profession.

If you have special needs (diet or disabilities), indicate them on your registration form or contact the STC office at 703/522-4114 to alert them and ensure that your needs can be accommodated.

*George F. Hayhoe is the founder of George Hayhoe Associates in Aiken, South Carolina. George is a fellow of the STC and member of the South Carolina Chapter. He is the editor of Technical Communication, the Society's journal, and served on the Society's board of directors from 1992-1996. George is the recipient of the APEX Award for Publication Excellence (1998), and winner of Awards of Distinguished Technical Communication from the South Carolina/Carolina Foothills STC chapters (1998-99).*

### HELP WANTED

#### Policies & Procedures SIG Newsletter Team

*Steps & Specs* is published quarterly and can always use extra help and suggestions. We need volunteers to solicit, and write, articles on policies and procedures topics and write reviews of newly published books about policies and procedures documentation. We also need help with production, layout and design; researching useful Websites; and contributing hints and tips. If you are interested in being a part of this award-winning publication, contact **Kathy Craddock** at [dizsuitsme@aol.com](mailto:dizsuitsme@aol.com) or 919/966-7904 for more information.

#### Policies & Procedures Listserv Team

The P&P SIG Listserv team needs someone to be responsible for archiving posts. This person would work with the Listserv manager to archive past posts and make them accessible to subscribers. If you have this experience, or if you've been looking for a way to get the experience and don't have a Listserv to work with, here's your chance. Interested? Contact **Audrey Cielinski Kessler** at [audck@aol.com](mailto:audck@aol.com) or 330/677-8598 for more information or to volunteer.

#### Policies & Procedures SIG Website

The SIG's website, <http://www.stc.org/SIGs/policies.html> is currently under revision, and suggestions for content are welcome. Contact **Lurette Arrowsmith** at [lurette\\_a@hotmail.com](mailto:lurette_a@hotmail.com) to share your ideas or to volunteer your skills and expertise.

## Manager's Column

By Audrey Cielinski Kessler

Organizations such as STC and, by extension, its network of special interest groups, rely heavily on the talents and skills of their members and their willingness to volunteer their time. As we all likely know, time—especially “spare” time—usually is in short supply, with work and personal commitments impinging on us from all sides.

So what would motivate a time-strapped P&P professional to volunteer to help with the day-to-day operations of the P&P SIG? I'm sure the reasons are many and varied, but what seems to distinguish successful and valued volunteers from the rest of the crowd is an attitude of “What can I give?” rather than “What's in it for me?” or “What can I get out of it to help further my career?”

This is not to say, of course, that getting a personal benefit from volunteering is bad or wrong or undesirable. It's simply an added benefit, like the proverbial “icing on the cake.” It's the giving that adds value to the organization; the personal benefit can make the effort seem that much more worthwhile. When the primary goal (or in some cases, maybe even the only goal) is “what's in it for me,” it's the organization and its members that suffer.

The emphasis then shifts to the individual and away from the group or the team and what is best for it and what will further its growth and usefulness to the membership.

Volunteering can take time that may not really be there, and it can make already hectic lives even more frenzied, but the payoff is that by giving, we also get back.

*Audrey Cielinski Kessler is the owner of The Write Hand of Ohio, a writing, editing, desktop publishing and Website design company in Kent, Ohio, a senior member of the Northeast Ohio chapter of STC, and manager of the Policy and Procedures SIG.*

## Your Turn - Responding to our Questions

Compiled by Kathy Craddock

*The following article is in response to the Your Turn question in the December issue of Steps & Specs: “What type of font should I use in hardcopy documentation? Should I use the same one for online documentation?”*

**From Carrie D. Cooper:** The ideal procedure documents are simple, clear, and orderly. Readers use these documents because they want to know how to do something. The more time they spend with your document, the less time they spend actually doing the task. Procedures are no place for overblown production, extra-fancy type, lots of clip art or anything else that will distract the reader from finding the needed information.

Since procedure documents are primarily designed to be read, your goal is to ensure that both headings and body text are easy to read and pleasant to the eye. Most of all, avoid quirky fonts. Some fonts, like Eras or Comic Sans, might be fine for headings, but they are too distinctive or informal to be used as body type in procedures.

*I personally recommend using a combination of sans-serif fonts for headings and serif fonts for body type.*

Serif fonts (those with little feet), such as Adobe Caslon, Adobe Garamond and Times New Roman, are easy on the eyes for large blocks of text. One of the most commonly used fonts, Times New Roman, first appeared in 1932 in *The Times of London* newspaper, according to the Microsoft typography page. *Before & After* magazine refers to the Times family as the “navy blue blazer of fonts” because they are always appropriate for text.

I personally recommend using a combination of sans-serif fonts for headings and serif fonts for body type.

Apply contrast to type weight, size, and scale to lead the reader through your document. Type size creates a visible hierarchy of importance, so headings should be deliberately larger than body text. Examples of nice font mixes include Gill Sans Extra Bold with Goudy and Franklin Gothic Heavy with Century Schoolbook. Don't have fancy fonts? Arial bold headings go well with Times body text.

Limiting the number of fonts in your document is a must (the standard guideline is to use no more than three fonts). Designer Roger Parker recommends combining different weights of a single sans-serif typeface for all display type to create a unified page. For example, Helvetica Extra Black for the headings, Helvetica Condensed Black for level-one subheads, Helvetica Bold for level-two subheads and Helvetica Light for pull-quotes, all used with a single serif font for the body text.

If you don't want to mix fonts, use a single font family (and yes, you should still employ differences in weight and scale with this one font). For example, in its written procedures, the company I work for uses the Arial family in this way: Arial Black 18-point for the document title, Arial bold 16-point for main headings, Arial Condensed Bold 12-point for level-one subheads, and Arial 11-point for body type. Carrie Cooper is a senior member of the Southern Arizona chapter.

#### Resources

*Before & After* magazine articles, “Contrasts: The Basis of all Design” (issue 10); “What Typefaces Work Together?” (issue 11); and “What Typefaces are Best for Text? Our Favorite Dozen” (issue 21).

*What Type Font, continued on page 8*

## Smart Companies, Smart Tools - Book Review

By Gem Smith

In his book *Smart Companies, Smart Tools*, Thomas M. Koulopoulos defines smart tools as the use of, "technology to remove the mundane and monotonous that impede creative innovation."

He says, "This book is about the inextricable relationship between business process and business assets, which, if understood, can provide quantum competitive opportunity for savvy organizations." Koulopoulos says the traits of a smart company include:

- Integrated rhythm of work independent of organizational structure
- High degree of process intimacy among employees
- Asynchronous communications to bridge time and geography
- Technology to leverage rather than eliminate people
- Strong emphasis on return on time as the principal success metric
- Extended enterprise that encourages nontraditional employment

To become a smart company Koulopoulos proposes using a technique called time-based analysis. This technique requires developing a system schematic or a visual representation of tasks to be performed whether in a department or larger business entity. The values of a system schematic are:

- It creates a corporate memory of the process
- It provides data for analyzing the process and
- It creates a dynamic framework for a collaborative reengineering of the process.

Koulopoulos emphasizes that a system schematic is a picture of what is at that moment and notes that the system schematic will go through a number of iterations. The system schematic shows

how long a task actually requires as well as all other activities related to the task. One case history showed that while it took five days to develop a procedure, it took a month to have it approved.

Of interest to technical writers is the author's description of how a system schematic is developed. He says, "The actual data for building the system schematic will come from a number of targeted interviews with users, sponsors, developers and any individuals considered representative of the organizational processes that have been targeted."

Koulopoulos devotes several pages to the interviewing process and suggests sample questions as well as advice on how questions should be framed.

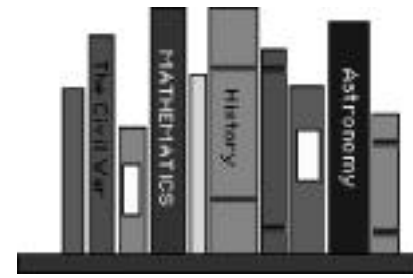
He cites case histories to illustrate how smart tools have been used to move work to the worker (process intimacy), reduce transfer times and queue times (time he calls "white space") without perceptible change to the task itself.

He defines transfer time as, "the time required to transfer information from one task to another" and queue time as "how long information will sit around before someone begins to work on it."

Koulopoulos observes, however, that no one takes responsibility for transfer time. It may seem to be part of the task but he says transfer time belongs to the process itself which makes it a process issue and not a people issue.

He says most people are astounded to learn that "the standard ratio of transfer time to task time, across almost all industries, is nine units of transfer time to each unit of task time."

To him, moving the work to the worker is the key to becoming a smart company. Koulopoulos acknowledges, however,



that getting there requires significant changes in organizational structure and attitudes. Referencing Henry Ford's contribution to industrial efficiency, Koulopoulos reminds us that it was not the assembly line itself that changed the nature of work but that the assembly line brought the work to the worker.

Koulopoulos explores how the internet, intranets and extranets bring needed information to anyone anywhere. "The key to creating a boundaryless enterprise lies in sharing not only information but also processes across the entire value chain of activities, from production to consumption, through a single universal computing interface. Transfer times can be collapsed, thereby creating new levels of intimacy with customers, suppliers, and teams. That, in essence, is the intranet. It is, simply put, the strongest process glue ever invented," said Koulopoulos. As an example of the lack of process intimacy, he cites Robert McNamara's tenure at Ford Motor Company. McNamara believed that statistical control, centralized accounting procedures and strict adherence to metrics were the key to efficient management of any organization large or small.

That view ignored employee relations, morale, job satisfaction and a firm's mission because these "soft" variables could not be measured numerically. Each chapter covers the details of the seven traits that identify a smart company using case histories drawn from his consulting practice with companies representing life insurance, defense contracting, computer hardware, cable entertainment and physical fitness equipment.

*Smart Companies, continued on page 11*

## Membership Matters - Quarterly Update

By Candie McKee

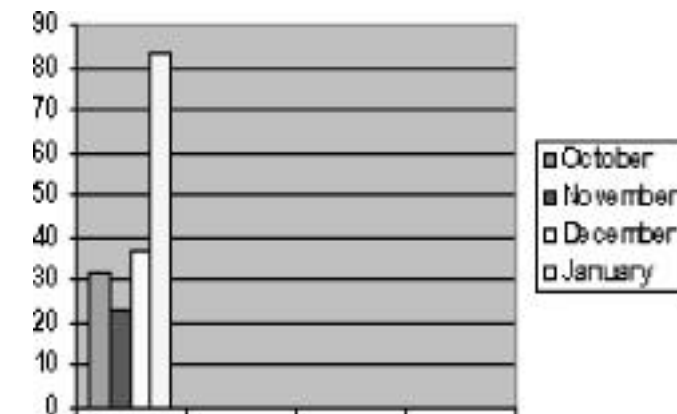
Are you a new member, and you haven't received your new member packet but are getting a newsletter? Are you a new member and have received **several** new member packets? Fear not! There is an answer to all of this mayhem.

For several months, the Society's office has had problems printing the new member labels for this SIG. Many of the same labels were being printed two and three months in a row, forcing new-members' names down the print ladder. The result: Many new members are receiving the new-member packet over and over for many months after signing up, and others aren't receiving anything at all.

The problem, we hope, has been solved. The Society's office has reprinted the labels, and I have begun a new process for mailing the new-member packets.

When I took over as membership team leader in October 2000, I had no idea how large this SIG was. We have more than 1,165 members from all over the world. That's 175 more members than when I took over. In January, alone, there were 83 new members. Isn't that great?

Of the 83 new members, seven were from Canada and three were from Israel. Here's how the new membership numbers have stacked up over the last four months.



You will see by these numbers that the Policy and Procedures SIG continues to grow and to reach out to members in several countries. The many skills and expansive knowledge our members bring is a vital resource to all.

If you are just joining the P&P SIG, watch for your new member packet in the mail soon. If you know of others in our field who are interested in joining the SIG please pass on the following information. From the STC web site (<http://www.stc.org>) click on *SIGs* in the left frame, and then click on *How to Join* when the right frame loads. We look forward to receiving new members each quarter.

If you have questions regarding your membership please contact Candie at [candie\\_mckee@yahoo.com](mailto:candie_mckee@yahoo.com) or call 818/557-0805.

*Candie McKee is a senior technical communicator with Netplex Group in Edmond, OK. McKee also works as an instructor for the University of Central Oklahoma. She has been a member of STC for six years and has been very involved in the Oklahoma chapter, serving in many roles.*

*What Type Font, continued from page 8*

page. I tend to agree with this. I use Times New Roman for body text and a sans serif such as Arial for headings. I find that a sans serif font is better for callouts or diagram/figure labeling. It looks cleaner. Because the text strings are short it is useful to slow down the reader so they catch this usually important information. I find serif fonts are not good screen fonts. Most monitors still do not have the resolution to smooth out the busy little curves and detail found in a serif font.

Jones finishes by posing this question, "Are there specially designed sans-serif fonts for screen use available that seem to be cleaner than the more popular ones in use?"

If you have an answer to this question, email your comments to [dizsuitsme@aol.com](mailto:dizsuitsme@aol.com), and they will be compiled and appear in the June issue of *Steps & Specs*.

### Reminders

Letters to the editor are always welcome. Send your comments to:

Kathy Craddock,  
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The deadline for articles for the June issue of *Steps & Specs* is May 15.

E-mail Kathy at [dizsuitsme@aol.com](mailto:dizsuitsme@aol.com) with your contributions.

together that you as the author can skip on detail in the graphic itself, thus making it dependent of the information in the text. At the same time, you should not assume that just because the graphic is self-contained and includes a good amount of detail that nothing more needs to be said in the text portion of the document other than something like “Table 4 is on page 8.” The text area is where you can and should expand on the details of the graphic.

Graphic elements in policy and procedure documents can be the key to understanding the intended message. Use graphic elements judiciously and effectively along with a well-written text and you can rest comfortably knowing that you have provided the reader with the tools to make communication happen.

*Author’s Note: The example illustrations used with this article are fictitious but are based on the formatting and/or content of actual tables and charts.*

Audrey Cielinski Kessler is the owner of The Write Hand of Ohio, a writing, editing, desktop publishing and Website design company in Kent, Ohio, a senior member of the Northeast Ohio chapter of STC, and manager of the Policy and Procedures SIG.

Table 3						
Software	P	U	C	S Con	Yr	Ex Dt
Acrobat	W, M	10	8	Y	1	12/1/00
PageMaker	W, M	5	3	Y	1	7/10/01
QuickSilver	W, U	50	50	Y	3	12/31/02
Word	W, M	100	100	Y	2	6/15/01

Figure 1: This example shows a table without a descriptive title and with undefined abbreviations.

Table 3. Software Holdings of XYZ Corp., 2000						
Software	P	U	C	SCon	Yr	ExDte
Acrobat	W, M	10	8	Y	1	12/1/00
PageMaker	W, M	5	3	Y	1	7/10/01
QuickSilver	W, U	50	50	Y	3	12/31/-02
Word	W, M	100	100	Y	2	6/15/01

*Note: P = platform; U = number of users; C = number of copies, Y = years; ExDte = expiration date; W = Windows; M = Macintosh; U = Unix; Yr = years.*

Figure 2: This example shows a table with a descriptive title and explained abbreviations.

*Note: Before & After magazine is no longer being published but it remains an excellent design resource. Back issues may be ordered from [www.pagelab.com](http://www.pagelab.com).*

Godfrey, Patricia M. “Type and Content: Some Simple Typographic Choices Clarify – or Obscure – the Text’s Meaning.” *Aldus Magazine*, September/October 1994; 51-58.

Levinson, Margie. “eHow to Choose a Body Text Font” 2000. <http://www.ehow.com/eHow/eHow/0,1053,9657,00.html?src=tre1>

Parker, Roger C. *One Minute Designer*, Indianapolis, IN: QUE Corporation, 1993.

Shushan, Ronnie and Wright, Don. “Lessons Learned.” *Publish*, April 1992; 38-40.

“TrueType Core Fonts for the Web” (WWW page with free downloads of high quality TrueType fonts). 13 December 2000, URL: <http://www.microsoft.com/typography/fontpack/>

**From Karina Ritchie**, who says, “The standard where I work is Times Roman 12. However, the font should match the message. I would not use the same font on an internal newsletter as I would use on a proposal. Whatever font is used, keep in mind the tried and true “60/40” rule: 60 per cent print to 40 per cent white space. Also, remember that the height of the lower case x-height

determines the legibility of the text. The higher the x-height the easier the read. In answering “Should I use the same one for online documentation ?” Ritchie suggests, “No. On the computer monitor, a serif (with little feet) font increases eye strain. It is best to use a sans-serif (without little feet) font for online documentation. Arial is the standard for my online policy and procedure manual. Italics are difficult to read on the computer monitor and should never be used. The same 60/40 rule applies for online documentation as hardcopy documentation.” Karina Ritchie is an Information Analyst at Banc One Investment Management.

**From Bill Jones** who comments, “I have always been told that body text in serif font is easier to read on the printed

# Hang onto Your Hats - The P&P SIG Is Blowing into Chicago

By Kathy Craddock

Join your fellow P&P SIG members at the STC 48th Annual Conference in Chicago, IL, May 13-16 at these two sessions:

**Tuesday, May 15, 4:00 p.m. - 5:30 p.m. WE 8Y Issues in Policies and Procedures** – This progression demonstrates how to ensure that policy and procedure documents prepared for online or hardcopy distribution are useful for the reader and meet the needs of management.

**Session Moderator:** Edward Frost.

**Presenters** are as follows:

**Lallie J. Hayes & Roberta Heinlein**  
Topic: How Policies and Procedures Guppies Can Swim with the Training Sharks.

Description: Synergies that can be gained between training and policies and procedures (i.e., standard operating procedures) include the following: training materials that refer to policies and procedures documents rather than duplicate them, sharing of the development process, engaging in joint efforts to conduct user- and task-analysis and pilot new materials, and sharing people resources to complete projects.

**Teeoh Otten**

Topic: Turning a Skeptic into an Online Reference Champion

Description: For writers of policy and procedure documents, building and maintaining cooperative relationships with content owners and subject-matter experts is essential to the success of the project. By understanding the business in which one works and supporting the organization’s goals, the policies and procedures writer can leverage the type of relationship that prompts knowledge holders to provide the resources needed to prepare a quality document. The progression presentation will focus on a process that acknowledges the importance of relationships and enables the writer to

quickly establish an effective and profitable relationship in a short amount of time.

**Edward Frost**

Topic: The Pros and Cons of Intranet Delivery Technologies for the Publication of Policies and Procedures Documents  
Description: The presentation will offer six recommendations both pro and con on the issue of publishing policies and procedures documents on an intranet.

**Audrey Cielinski Kessler**

Topic: If You Write It, They Will Read It—Maybe

Description: As with people, looks aren’t everything, but appearance and presentation do matter. And it’s also true of policy and procedure documents. The physical appearance of a document—both the front cover and all the pages in between—can affect the reader’s desire to use the document and his ability to find the information he needs or wants. If the document is placed on shelf, hereafter forgotten, creation of the document was a wasted effort. Whatever jewels of information the author packed within the pages are of little value. The goal is create documents that not only contain technically correct and useful information but also are visually appealing, easy to read and make finding needed information a simple task.

**Kathleen Craddock**

Topic: Preparing Policy and Procedure Documentation (and Authors) for an Intranet

Description: The table host will discuss what needs to be done to prepare the organization’s existing documentation for HTML delivery, design an intranet site, work with users to convert existing and design new documentation for HTML, develop standards (and then follow them), determine what information should be included (and excluded) on the

intranet Web site, and teach employees how to use the intranet to find information.

**Susan Wolford**

Topic: Single-Sourcing Procedures Without All the Tools

Description: Don’t dismiss the single sourcing process just because you can’t get your hands on the right tools. If your operation doesn’t have the budget or someone outside of our industry selects your tools, there is no excuse not to take advantage of single sourcing process. This session takes a creative look at ways to employ single sourcing principals with common tools like Word. When the corporate world says “no” to your request for new software, you can still say “yes” to single sourcing.

**Ralph Robinson**

Topic: International Standards  
Description: The presentation will cover the impact of international standards on policy and procedure writing, with an emphasis on ISD 9000:2000 and ISO 14000.

**Raymond Urgo**

Topic: Trends in Policy and Procedure Communication

Description: The presentation will address how the following are having an impact on P&P communication: technology, business, industry, organizational development, and competition from other disciplines. Trends within the discipline of P&P communication also will be discussed.

**Kat Noftz Nagel**

Topic: Each One Teach One  
Description: The presentation will focus on creating a self-containing policies and procedures environment by creating templates and encouraging cooperation, collaboration and knowledge sharing.



## Member Profile: Heather Brown-Palsgrove

By Kathy Craddock

*Editor's Note: This quarter, Steps & Specs is featuring a P&P SIG member and the STC Annual Conference host city, Chicago, Illinois. If Chicago is new to you, as it is to me, you will learn a little bit about the city, especially the area where conference attendees will be staying, and what to do, where to eat, and what to see in your spare time. And you will meet one of the conference volunteers who is also a SIG member, Heather Brown-Palsgrove. Read on.*

*Brown-Palsgrove works with Spirian Technologies Inc. in downtown Chicago (located in the NBC Tower, which is across the street from this year's STC Conference headquarters). Spirian, a management services company, provides automated technology services such as rapid deployment of business-critical applications and remote management of PCs to Fortune 1000 companies. Heather is a senior technical writer at Spirian. A member of the Chicago chapter of STC, she was a judge for the STC Documentation Competition. When you see Brown-Palsgrove at this year's conference take a minute to say hello.*

**S&S: Tell us about your responsibilities at Spirian?**

**HBP:** I coordinate, write and manage the client-based documentation that accompanies the company's technology solutions. Depending on the product offering and/or the client environment, this can be as technical as a design specification or as specialized as an end user's guide for one of our proprietary software applications. For internal documentation, I coordinate ancillary documentation projects for development methodologies, process and procedure categorization and workflow definition.

**S&S: What do you like most about your job?**

**HBP:** I most enjoy projects that afford me the opportunity to consider the audience when designing, writing and testing documentation. I consider myself fortunate to be influenced by instructional designers and the principles of information design early in my

technical writing career, and today I'm most intrigued by those writing or design principles that contribute to the end user's understanding. For procedures, for example, it's deciding how to best chunk information, sequence steps and create transitions to improve the user experience and ultimately assure the success of the procedure.

**S&S: What is your background?**

**HBP:** I graduated from Lawrence University with a B.A. in English and biology. I am a strong proponent of a liberal-arts education, even for those interested in the technology industry, because of the emphasis on critical thinking and problem solving. Of course, these skills translate well for any industry, but for the technology industry in particular, they prepare me to tackle the ever-changing face of development mediums, software applications, and hardware configurations. Many of my college alumni are now working in the technology and computer industries / including several who are technical writers.

**S&S: And now, tell us a little bit about Chicago.**

**HBP:** Before I begin, I should confess that I'm not a native Chicagoan. In fact, it wasn't so long ago that I moved here I was initially thrilled by the prospects of the big city but then became completely overwhelmed once actually faced with the task of **doing** something here. I felt so compelled to know all of the city at once that I didn't even take the time to find out what I actually liked. It wasn't until my first out-of-town guests came and I saw Chicago again through the eyes of a visitor that I truly appreciated having the opportunity to live here and try everything there is to offer.

When the STC 48th Annual Conference rolls around, it's possible that you, too, might have a hard time deciding what to do with your free time before, during and

after the conference. Check out the following list of proven Chicago favorites to help you decide.

### Free Stuff

Chicago's business district, which is called "The Loop" because of the elevated train tracks encircling the area, boasts an impressive collection of **public art**. Along the walk to the most well-know works by artists such as Picasso, Miró, Calder, Chagall, and Haring, you're bound to come across many other pieces that have become Chicago icons. For more information on Chicago's public art, see the city of Chicago Web site at <http://www.ci.chi.il.us>.

If you are an **architecture** buff, you will also appreciate the public art in the many important architectural triumphs of our great city, including works from Louis Sullivan, Mies van der Rohe, and Frank Lloyd Wright. If you are willing to spend a little dough, one of the most popular guided tours, the Architecture River Cruise, includes a trip down the Chicago River with a guide from the Chicago Architecture Foundation. For more information, tour hours, and reservations, (which are recommended) see <http://www.architecture.org>.

It's impossible to miss one of the Chicago's greatest landmarks: **Lake Michigan**. The lakefront poses many opportunities for recreation, exercise or just plain relaxing. Simply find your way to the lakefront walk by walking east and observe Chicagoans in their native habitat. If you are the ambitious type, you can also explore the lakefront by walking north to neighborhood areas like **Lincoln Park** and **Lakeview** or walking south to areas such as **Grant Park**. But if you are like me, you will just find a nice patch of sun and kick back with a good book. You will be in good company either way.

*Member Profile, continued page 7*

Also try the **Lincoln Park Zoo**. From its inception in 1868, the LPZ continues today to be a free zoological park. The diverse collection of animals and newly constructed exhibits (check out the new Sea Lion pool) makes our zoo one of the best in the country. Because exhibits typically close around 5 p.m., consider adding this to your checklist of pre- and post-conference activities. At approximately three miles from the conference headquarters, this is a fast bus ride (local 151), cab ride, or walk. For zoo hours and special events information, see <http://www.lpzoo.com>.

### Dining Options

**Potbelly's Sandwich Works** at 190 N. State Street is just a short walk from the headquarters, but be prepared to spend twice the time standing in the line for what most Chicagoans consider to be the best sub sandwich around. Besides the food, it's worth the wait to sit and enjoy the comfy, antique-style décor and the resident guitarist that performs during weekday lunch hours.

If you don't know why the **Billy Goat Tavern** at 430 N. Michigan is a slice of American culture, then that's reason enough to at least **visit** the infamous haunt of Chicago Tribune and Sun-Times reporters and journalists, if not stay to enjoy one of the "cheezborgers" immortalized by Saturday Night Live's John Belushi. Be sure to check out the picture gallery: it's a guaranteed way to get some celeb-sighting in.

Chicago-style pizza might be a myth in other parts of the country, but it's definitely for real here in the Windy City. One of the best places to try downtown is the original **Pizzeria Uno** (29 E. Ohio), or a larger expansion restaurant with the same menu, **Pizzeria Due** (619 N. Wabash). If you decide to go, consider ordering your pizza in advance, as pizza orders typically take 30-45 minutes. Either way, though, you're bound to have good pizza.

While not necessarily a Chicago-exclusive restaurant, the **Cheesecake Factory** (875 N. Michigan) is definitely a Chicago favorite and well worth a visit.

The menu, a veritable book, includes an assortment of appetizers, salads, pasta, sandwiches, seafood and traditional entrees with some ethnically inspired dishes and comfort food thrown into the mix just for fun. And yes, they **do** have cheesecake, more varieties than you might care to count, so be sure to save room. With this long list of options, though, comes a similarly long waiting list (in some cases, upwards of two hours). Don't even try to get in and out for lunch. Plan on dinner, and try to get there early. Fortunately, the Cheesecake Factory is close to the conference headquarters, so you can plan on a brisk walk or a bus or cab ride to get you there quickly after the day's last session. If you go, plan on staying afterwards to tour the **John Hancock Observatory**. It's not far and it won't take long, just a 94-floor elevator ride in under 40 seconds. From the top of the John Hancock, Chicago's second-tallest building and nicest lookout point, you can see everything that's great about Chicago. For more information and a discount coupon, see <http://www.hancock-observatory.com>.

You might have already heard about **The Bergoff** in The Loop (17 W. Adams). It's not just a beer, though. It's a restaurant, and one of Chicago's oldest and most famous restaurants to boot. True to its name, the Bergoff serves traditional German food, but also has added some light and vegetarian options to the menu in later years. Beautiful wood detailing and styling in the bar and restaurant area make this an especially close and charming Chicago location to meet in-town friends and relatives or to dine with your fellow STC members. For more information and a menu, see <http://www.berghoff.com>.

You will find Italian at **Italian Village**. Another Loop favorite at 71 W. Monroe, the Italian Village includes three different restaurants that provide a range of menu options spanning northern Italian, regional Italian and Italian-American cuisine. For menus, see <http://www.italianvillage-chicago.com>. The Italian Village is an economical dining option and my favorite restaurant of

those mentioned here, imitates an Italian outdoor terrace with twinkling lights. If you want to feel important, call ahead and reserve one of their dark, curtained booths so that you and your company can dine privately.

### Culture, Culture, Culture . . .

Consider planning some time before or after the conference to visit some of Chicago's cultural opportunities.

**The Art Institute** (111 S. Michigan Avenue). The Art Institute offers a wide collection African, Asian, European and American art, including an of extensive collection of Impressionist painters such as Monet, Gauguin, Renoir, Van Gogh, Cezanne and Caillebotte. See <http://www.artic.edu>.

**Field Museum** (1400 S. Lake Shore). Exhibits and collections devoted to the biological and anthropological exploration of the natural environment. Popular exhibits include: *Sue*, the largest T. Rex skeleton, and *Underground Adventure*, a tour of the soil ecosystem from a bug's perspective. See <http://www.fieldmuseum.org>.

**Museum of Science and Industry and Omnimax Theatre** (5700 S. Lake Shore Drive). An in-depth exploration of both early- and modern-day manufacturing and engineering processes. Popular exhibits include the Coal Mine and the Fairy Castle Dollhouse. See <http://www.msichicago.org>.

**Adler Planetarium and Astronomy Museum** (1300 S. Lake Shore). Planetarium features a new StarRider Theatre, a virtual, self-controlled space tour, as well as special space exhibits at the adjoining museum. See [www.adlerplanetarium.org](http://www.adlerplanetarium.org)

**Shedd Aquarium and Oceanarium** (1200 S. Lake Shore). Aquarium exhibits include fresh and saltwater fish and aquatic mammals from around the world. The new Oceanarium wing replicates the Pacific Northwest Coast environment. See <http://www.sheddnet.org>.