

Other seminars scheduled for 2002 are as follows:

- February 6, "From World-Weary to World-Ready: Usability for International Users." Hans Fenstermacher will lead the presentation.
- February 20, "Creating Effective Documentation Plans." John Hedtke is the presenter.
- March 6, "Communicating Clarity: Make your Technical Marketing Matter." The seminar leader is Pamela Selker Rak.
- March 20, "Creating Usability Goals: Understanding What Usability Means to Your Users." Whitney Quesenbery will lead the presentation.

The cost for each seminar is \$125 U.S. and \$140 Canadian. Overseas participants should contact the STC office. An additional \$10 will be charged for registration received less than five days before the seminar.

As cost-effective and time-efficient ways of improving your skills and knowledge, telephone seminars are much like a large conference call, but in a more controlled environment. Simply dial the 800 number from your telephone, enter the provided personal identification number, and you're connected. Then sit back and listen to the presentation and join in the discussions.

If you have questions, contact Buffy Bennett at the STC office by email at buffy@stc.org or 703/522-4114 ext 251.

tone, consider why this is so and whether a shift to the present tense might better coincide with the organization's culture. Finally, if you are an intermediary P&P writer who uses others' policies, procedures or standards containing loads of *shalls* and *wills*, adapt the information for your audience by using the present tense where appropriate.

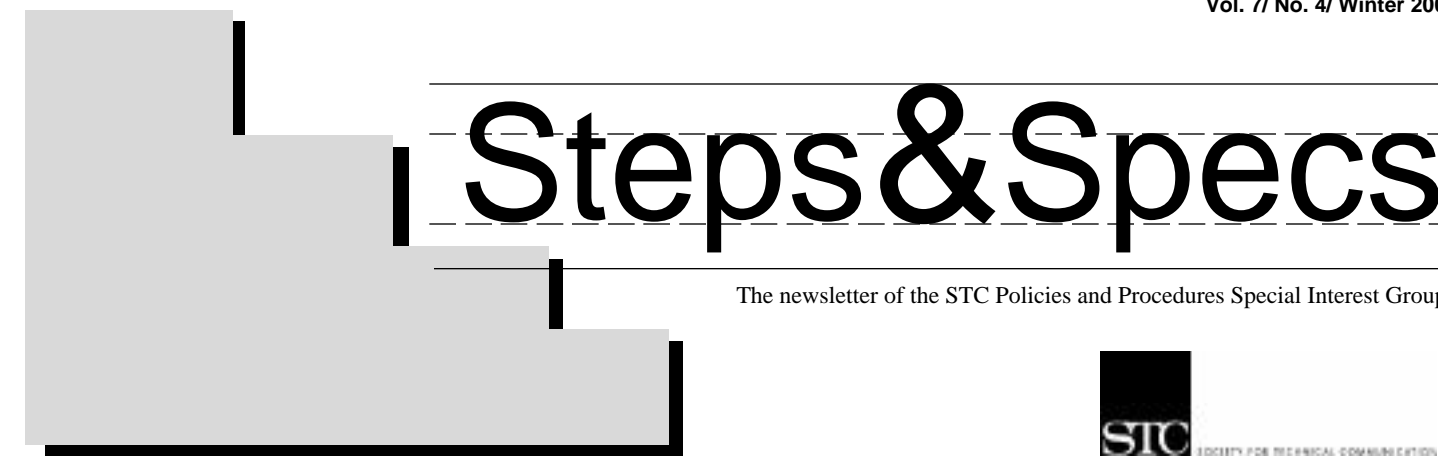
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*The mission of the Policies and Procedures special interest group is to assist STC members in developing, implementing, and managing policies and procedures communication through educational and networking opportunities. STC conference sessions and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

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## Web Site Redo Enhances Clarity of Information, Ease of Use

By Katherine Vivirito

For some time, visitors to the Web site of the Standards-Based Management System (SBMS) office at Brookhaven National Laboratory (BNL) in Upton, New York, had asked for a more user-friendly site. The site in question is a Web-based documentation system that ensures that the laboratory's staff follows policies, standards of performance, and laboratorywide procedures and guidelines.

In response user requests, BNL began an overhaul of the site, including the design of a friendlier and more inviting home page. After months of hard work by the BNL staff, a new site for SBMS was launched in June.

During the overhaul, the home page was made friendlier by adding mouseovers that briefly describe procedures. On the old site, users accessed procedures through an alphabetical listing. Now users can still do that, but they also have two other options: a category index and a keyword index for browsing.

The site's search capabilities also were enhanced with the addition of a navigation bar on the left-hand side of the home page, giving users access to BNL products and other laboratorywide information. The format of the

laboratory's procedures was revised as well. They now are grouped by subject area. New features show users where they are while navigating subject areas. The new navigation system allows users to move easily to any section of a given subject area.

The look of subject areas was changed in terms of font and point size, layout, background colors and other features. Writers and editors in the SBMS office revised the format of the subject areas based on suggestions from users and subject-matter experts and the staff's expertise.

Subject areas are topics identified as being part of the laboratory's work processes. They contain the required step-by-step instructions and guidelines for laboratory staff to follow. Subject areas do not contain internal procedures. These subject areas were written or edited using Dreamweaver Web-site software. Templates used for developing subject areas before the site overhaul had to be recreated and new ones written. Subject-area templates contain the following parts:

- Contents
- Introduction
- Sections
- Exhibits

- Forms
- Definitions
- Revision History

The Contents contains links to the following parts: Introduction, Sections (that describe the procedures), Definitions, Exhibits, Forms, Training Requirements and Reporting Obligations, and References. Also listed in the Contents are standards of performance and the management system to which a subject area belongs.

Several improvements were made to the Contents. Brief overviews of the contents for each section of the subject area were written. For example, before users click on the section called

*Web Site Redo,*  
continued on page 7

### In This Issue:

<i>Web Site Redo.....</i>	<i>1</i>
<i>Everything You Ever Wanted to Know About Policies and Procedures.....</i>	<i>2</i>
<i>Manager's Report .....</i>	<i>3</i>
<i>Trove Software Brings Usable, Manageable P&amp;P Documents to Company Intranets.....</i>	<i>4</i>
<i>Use of Shall and Will in P&amp;P Documents.....</i>	<i>5</i>
<i>STC 2002 Telephone Seminar Schedule.....</i>	<i>7</i>

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## HELP WANTED: P&P SIG Webmaster

Web site designer needed for P&P SIG Web site redesign and maintenance. Experience required. Good working knowledge of Dreamweaver software preferred. Must be able to meet deadlines. Starts immediately. For more information or to volunteer, contact SIG Manager Audrey Cielinski Kessler at audck@aol.com or 330/677-8598.

## Everything You Ever Wanted to Know About Policies and Procedures

By Terri Avizienis

*Editor's Note: Terri Avizienis is a two-year member of the Los Angeles Chapter of STC and a member of the Policies and Procedures SIG. Formerly in Loss Prevention Consulting, she is looking to make technical writing her new career. She is completing the Technical Communication certificate program at UCLA Extension. She completed P and P SIG member Raymond E. Urgo's class in policies & procedures communication in the winter quarter, 2000. Here is her review of that class.*

Writing policies and procedures is much more than just writing instructions. It's a lot more than just remembering to use imperative mood, active voice and parallel structure. I wanted to learn exactly what was involved. So last year, I enrolled in P and P SIG member Raymond E. Urgo's online class in policies & procedures communication.

Are there any advantages to learning online, besides the obvious advantage of being able to avoid freeway traffic? The online classroom interaction can be better than the interaction in a traditional classroom, where the more outspoken student speaks first (and longest). Other students can feel neglected. Often, time simply runs out. In an online classroom, everyone gets the opportunity to participate. No one feels rushed to give an answer. Also, Urgo's class drew people from all over. In addition to local, Southern California students, the class included people from Illinois, Arizona, Massachusetts and South Dakota, as well as from Canada, Italy and Lebanon.

Urgo covered all aspects of policies and procedures. He defined P&P, taught us about the various types of information, and gave us the rules and grammar for writing them. He explained the P&P development process, how P&P documents are controlled in an organization, and the role of the P&P professional.

He explained the various techniques for presenting P&P:

- Prose-based
- List-based
- Checklist/worksheet
- Decision table
- Flow diagram
- Playscript

He also taught us how to write in a modular/structured style. To illustrate the advantages of this style of writing, he gave us a timed test. It involved answering a question using two sets of procedures: one written in prose and one written in a modular style. The modular example won hands down. Using the modular example, the class took 45 percent less time to find the answer, with 100 percent accuracy versus 77 percent for prose. And Urgo practices what he preaches. His textbook is a wonderful example of modular documentation.

*P&P Class, continued on page 3*

*Web Site Redo, continued from page 1*

Packaging and Shipping Radioactive Materials from BNL to Offsite in the Transportation of Radioactive Materials Offsite Subject Area, they can read the brief, bulleted summary in the overview to decide if this is the procedure they need to follow.

Forms and exhibits were listed separately, where once they had been combined. A form is no longer considered to be an exhibit. An example of an exhibit is a flowchart. Forms now is a separate heading in the Contents. In addition, all forms were combined and made accessible from the site's home page. Users have said that they like this feature, noting that they find it much easier to search for a form by clicking the Forms button.

A heading for Training Requirements and Reporting Obligations was added. Now users do not have to read the entire subject area to find out if the subject area contains training requirements. If the subject area contains training requirements, a link to the laboratory's training Web site (which lists courses and other requirements) is provided.

Under the old format, References was referred to as Related Information. The revised site uses the term References because the old name misled subject-matter experts into thinking that this part of the subject area was a bibliography and not a compilation of the references cited in the subject area.

The new site also added a heading for Management System. Under this heading was the title of the management system to which the subject area belongs. Management systems are the laboratory's highest-level operating and business processes. They are designed to translate the external requirements into the information the staff need do to their work. For example, the Performance Appraisal subject area belongs to the Human Resources Management System.

The Revision History part of the template had been referred to as About File and deemed not intuitive. The Revision History lists the date the subject area was first published online and the dates of major revisions. It briefly describes the new subject area or the revisions to it and the effect these changes have on users. The Revision History description in a laboratorywide e-mail to notify staff when a new subject area or major revision is published. Changing the title has made it easier to track revisions and keep users informed.

Subject areas published in the old format contained an issue date that was changed to effective date on the new site. The effective date is the date when the staff are responsible for meeting the requirements and following the required procedures. Issue date was too ambiguous and could cause problems in meeting deadlines for internal and external regulations.

The SBMS staff is pleased and proud of the positive response that has been received since the new SBMS site was launched. Feedback is welcome. To view the site, go to <https://sbms.bnl.gov/>.

*Katherine Vivirito is a writer/editor in the Standards-Based Management System Office at Brookhaven National Laboratory in Upton, New York. She is a member of the Long Island Chapter of STC.*

### Reminder

The deadline for articles for the Spring issue of *Steps & Specs* is February 15.

Email your submission to Kathy Craddock at [dizsuitsme@aol.com](mailto:dizsuitsme@aol.com) or 919/966-7904.

## STC 2002 Telephone Seminars Schedule

STC is offering six telephone seminars in 2002. Beginning January 16, two seminars will be offered each month through March 2002. Telephone seminars have been very successful in bringing cost-effective training to STC members and others seeking to improve their skills and knowledge. This year, STC is offering online registration at [www.stc.org/seminars.html](http://www.stc.org/seminars.html).

In the first seminar, Basil White will discuss "Building a Product, Manual, and Web Site Using Customer-Focused Design." The seminar will be held on January 16, from 1 p.m. to 2:30 p.m. EST.

Washington, D.C., consultant and STC member White will teach a strategy for using a goal hierarchy, a process flowchart and a product state table to construct a customer-focused plan for every facet of a product: interface, documentation, online help, training materials and customer service.

The second January seminar is scheduled for January 30, from 1 p.m. to 2:30 p.m. EST. "Developing a Strategic Framework for Technical Marketing Communication" will be led by Sandra Harner and Tom Zimmerman.

*Schedule, continued on page 8*

### Help Wanted

The P&P SIG is presenting a panel discussion on the "impossible" project at the STC Annual Conference in Nashville, TN.

Have an impossible project story you'd like to share?  
Contact Audrey C. Kessler at [audck@aol.com](mailto:audck@aol.com) or 330/677-8598 for more information or to volunteer.

writer who is a recipient of the source information? at the county level said, "We just find it easier to copy what we received and make only the necessary changes in content to meet our county department's unique needs." In essence, they are unconsciously perpetuating an imperial tone in the content to their end users—namely, administrative staff, case workers, social workers and supervisors.

Another P&P writer in this county department said, "I once tried communicating in the present tense. My director, a longtime employee, returned the document to me to redo because he had never read such a document expressed that way at the county." Hopefully these intermediary P&P

in the present tense is more effective for their intended end-user audience.

A second example of an intermediary role concerns those organizations writing policies and procedures for their quality management systems as part of their effort to become certified under one of the ISO (International Organization for Standardization) standards. The ISO standards use *shall* to mean that compliance is required and *should* to mean that compliance is recommended. According to Ralph Robinson, a Canadian-based teacher and author on policies and procedures for ISO standards, "The use of auxiliaries is something that stems from legal

are confusing terms. There is no requirement in the ISO standards for organizations to use the words *shall*, *will*, *should* or *would* in their P&P documentation. In fact, in all my teaching, I strongly advise people not to use these words."

In summary, be conscious of the tense you are using and the use of the auxiliaries *shall* and *will* in your P&P writing. Use *shall* and *will* only to indicate futurity, a strong promise or a threat. When writing policies and procedures for future use, remember to focus on your audience. Your audience reads P&P documents in the present of their time frame, not the future of yours. If your organization's P&P

**Examples of when to use shall and will**

**Use shall or will to indicate . . .**

Futurity

**For example . . .**

If you are not satisfied within 30 days, Acme Corporation *will* refund your money in full.

A Strong promise

If you are not satisfied within 30 days, Acme Corporation *will* refund your money in full.  
In hiring and staffing, Acme Corporation *will* not discriminate based on age, race, creed . . .

A Threat

Violators *will* be prosecuted to the full extent of the law.

**Examples of when not to use shall and will**

**Change this example from . . .**

Acme Corporation *will* reimburse employees for the full tuition of a job-related course when . . .

**To this . . .**

Acme Corporation reimburses employees for the full tuition of a job-related course when . . . [Appropriate if a strong promise is not intended.]

Managers *will* reconcile their department's petty cash account on the last day of each month.

Reconcile your department's petty cash account on the last day of each month. [Appropriate if only "managers" are your audience.] (or)

Managers are responsible for reconciling their department's petty cash account on the last day of each month. [Appropriate if "managers" and others are your audience.]

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writers will gradually nibble off the many *shalls* and *wills* they inherit from their higher governmental agencies. In doing so, they may eventually convince their top-level administrators that writing

language and is often found in standards documents, as it is felt they clearly separate requirements from recommendations. Actual practice, however, seems to indicate that they too

documents are written with excessive *shalls* and *wills* that yield an imperial

Use of Shall and Will, continued on page 8

## Manager's Report:

### Conference Presentations . . . Managers Teleconference . . . Adding Value . . . Collaboration with Other SIGs

By Audrey C. Kessler

I am pleased to report that the three proposals the P&P SIG submitted for presentation at the annual conference next year have been accepted. The three proposals included two panels and one progression, giving the SIG a presence at one additional venue compared with last year.

One of the panels deals with surviving an "impossible" P&P project—including the problems that arose and tips and advice on how to work through the problems, complete the project successfully and possibly avoid a repeat of the unfortunate situation. This panel, however, is short one panelist. If you would like to fill that vacancy, please e-mail me at audck@aol.com or call me at 330/677-8598.

The other panel deals with the challenges facing an organization's lone P&P communicator. Panelists also will discuss how they overcame the challenges in their interactions with subject-matter experts, management and others in the organization.

For the progression, 11 P&P SIG members have agreed to be presenters. Progression topics include an array of subjects, including issues pertaining to subject-matter experts, the lifecycle of a procedure, taking P&Ps online and creating a style guide for non-P&P writers.

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I had another opportunity this month to participate in a teleconference for small groups of SIG managers. The calls were hosted by the STC office. Unlike the previous time the call was arranged, I was able to connect successfully with the other callers.

\*\*\*\*\*

In addition to discussing some "housekeeping" matters, the callers talked about how to add value to SIG membership. Ways cited included newsletters and Listservs. On the topic of Listservs, the matter of how to generate List traffic received a considerable amount of attention. It was noted that often the traffic is sporadic and, for some, picks up in the weeks leading up to the August 1 deadline for submitting conference proposals. I encourage all P&P members to use the Listserv as a resource of information from a broad array of P&P professionals. If you have any ideas on how to generate discussion on the list, let me know. Or if you have a question or issue you would like some feedback on, post it to the List.

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Another topic of discussion was the possibility of collaboration with other SIGs and how to accomplish this. SIG Web sites were suggested as a possibility. As you may have learned, the P&P SIG's Web site is still under revision. I apologize for the delay, which was caused by a number of factors that, I hope, have now been resolved. I'm hopeful that the site will be up and running again shortly after the start of the new year. If you have any suggestions for content, let me know, and I will see if it can be incorporated into the site. In the meantime, I hope all of you had a joyous holiday and a happy new year!

How did Urgo structure the class? Every week we had reading assignments from the textbook. We answered discussion questions from the reading and from our professional experience. Since we had access to every student's answers, we could comment on each other's answers, as in a traditional classroom discussion. We completed several small assignments each week. We also critiqued other students' work. Whenever possible, we tried to meet every week in the class chat room.

What kind of assignments did we get? They covered the full range of P&P documentation. Our smaller assignments included writing a decision table, a linear process and a playscript procedure. We had to create a miniplan to implement a P&P program.

We compared and contrasted five real-life P&P sample documents for their use of the following:

- Up-front organizers
- Extrinsic/intrinsic format
- Passive space
- Style of P&P communication
- Outlines
- Visual aids
- Telegraphic style

Our larger assignments involved complete rewrites of a procedure memorandum and a procedure bulletin. Urgo always presented real-life samples for the "before" documents.

This class was great and truly whet my appetite for learning. I hated for it to end. But Urgo's office is in Hollywood, and like his neighbors in "the biz," he believes that "you should always leave them wanting more."



## Trove Software Brings Usable, Manageable P&P Documents to Company Intranets

By Edward Frost

*Editor's Note: This article is not meant as an endorsement of the Trove software or the software developer, Ringwood Software, the company for which the author works. The article is intended as a description of users' experience with the product.*

**M**aking policies and procedures available on an Intranet is one thing. Making them useable in a controlled and managed way presents the technical communicator with a whole other set of challenges. A review of some of the recent messages on the Policies and Procedures SIG Listserv tells me these are issues many members are actively confronting.

In my article in the June issue of *Steps & Specs*, I detailed experiences about running an online documentation project. In this issue, I will introduce a software product that has helped quite a few members achieve success in making usable and manageable P&P documents available on an Intranet. The product is called Trove from Ringwood Software Inc.

Trove is a highly specialized software application that allows an organization to publish P&Ps from any word processor directly to an Intranet (or from Windows networks or CD-ROMs). It was designed to present a simple two-screen interface to the end user and to require only minimal training to use the interface. For writers, there is direct support for Word and WordPerfect. PDF, RTF, ASCII and all common graphics formats are supported as well.

Trove presents P&P documents in a library, complete with "shelves" and "folders" to categorize and secure documents for general use or limited access. When a user views a document, the software dynamically renders it to

HTML and converts any graphics to Web-ready PNG format.

Large documents can be "chunked" into more efficiently sized Web pages, and all hyperlinks and structural hyperlinks are automatically managed.

There are, of course, many ways to place P&P documents on a Web site, the most common of which is to simply convert Word documents to HTML and store them on an Intranet server. Companies that had tried this approach found three problems that prompted their move to a software such as Trove:

- *Translation to HTML.* A major East Coast teaching hospital had six temporary staff persons spending their days "correcting" the HTML created by Word before putting the documents on the company Intranet. It seems that translating word processor documents to HTML still involves technical know-how to produce good-looking results.
- *Chunking.* Sizing the HTML to work efficiently over a network and linking all of the chunks together is a significant task.
- *Link Management.* This issue arises only after a few months with documents saved in HTML. Updating a section of a document can produce a nightmare of checking and mending links. Having Trove manage all the structural and navigational links is a big plus.

Another approach to getting P&P documents on an Intranet is to convert documents to PDF, the so-called industry standard for Web-based documents. The software for doing so is inexpensive, and virtually everyone can use PDF files, making this solution seem like an obvious one. If you have just a few

documents, and they are not very large, then this solution may be the one to choose.

SunTrust Bank took this approach, and it worked for a while. Authors would pass documents to a central technical writing team to convert the documents to attractive, linked and practically sized PDF files before loading them onto the Intranet server. However, because it would take a skilled PDF technician a considerable amount of time to convert each document, a backlog of work began to grow. Linkages among multiple PDF files left all of the files open, causing computer memory problems. Users grew unhappy and complained that they were unable to find the information they needed quickly. By implementing the Trove software, the bank was able to offer its users a simplified system that required minimal training for the staff.

At some companies, the issue is about management. Mobil Plastic Europe, for example, uses the Trove software to allow teams in four countries to develop and deploy documentation within their own part of the organization as well as centrally share certain documents both internally and with external vendors and suppliers.

Trove was launched seven years ago and is available in the United States and the United Kingdom. It is used by several hundred organizations ranging in size from 50 to 200,000 personal computers. More information about the software can be found at [www.ringwood.com](http://www.ringwood.com).

*Edward Frost is a member of the Boston Chapter of STC and the Policies and Procedures SIG. Through 17 years of experience with Ringwood Software, he has helped implement online documentation solutions in companies across the United States and Europe.*

## The Use of *Shall* and *Will* in P&P Documents

By Raymond E. Urgo

**W**hile assessing a set of departmental policies and procedures for a county government during a consulting engagement, I found many *shalls* and *wills* sprinkled throughout the documents. Here are some examples: "Case workers shall be required to . . ." "All requests will be submitted on . . ." and "Managers will report all findings . . ."

I asked several of the department's P&P (policies and procedures) writers why they used *shall* and *will* so plentifully. In essence, the best and only substantial answer I got was "We've always done it that way!" We all laughed in agreement—because these P&P documents were written to say what shall or will be done in the future, and the end user would not have to take any responsibility for doing what was written. Not taking responsibility to perform is just the opposite reason of why organizations issue written P&P documents.

The words *shall* and *will* (and even their cousins *should* and *would*) are auxiliaries to verbs. If I say, "I shall go . . ." or "Managers will report . . .," I refer to an action that will take place in the future. Some might further cite grammatical rules that say to express simple futurity, use *shall* when the subject is the first person and *will* when the subject is the second or third person. Another grammatical rule states to do just the reverse if you want to express strong determination, a promise or a threat.

I would like to suggest a rule—at least for writing policies and procedures—that takes the place of all these other rules. My suggested rule is this: Avoid using *shall* or *will* in writing policies and procedures unless futurity, a strong promise or a threat is intended. The rationale is that when truly needed, these auxiliaries can only help us when we in fact want to indicate an action that is to take place in the future or to make a strong promise or a threat. Also, the

present tense is more direct because it does not qualify the verb with an auxiliary verb.

So why, then, do some P&P writers use the future tense when the present tense is more suitable? I have heard, found and observed several reasons. These reasons include being unconscious, not writing to one's audience, using an authoritative tone from a previous era and using P&P information or a standard intended for an intermediary (not an end user) audience.

According to the *Shipley Associates Style Guide*, "most writers choose their tenses unconsciously, but several basic conventions exist for selecting tenses in tech writing." A related reason for using the future tense is that some P&P writers unfortunately are writing to themselves and not their audience. When they sit down to write, they think "people don't follow this today, but they will soon follow it in the future." In essence, these writers are thinking for the future, not for the present in the future. When their audience reads the P&P document, the policies and procedures are in existence; therefore, the present tense is needed.

Another reason why writers use *shall* and *will* excessively in P&P documents is to give the information an "imperial tone," according to Leslie Matthies, author of the *New Playscript Procedure*. An imperial tone in P&P documents tends to sound legal, authoritative or even biblical. Matthies points out that as P&P writers, we are not kings (and I add queens, gods, prophets) or their ministers writing proclamations to be issued to subjects of the kingdom. An imperial tone in P&P writing stems largely from the post-World War II era when large business organizations valued authority and conformity in their cultures. Many people working in this era probably found an imperial tone acceptable because they were already familiar with an authoritative tone from military-style command media used during World War II.

Unfortunately, I find that many organizations communicate their policies and procedures in an imperial tone (and even other styles) that is obsolete to their present day culture. For example, a client organization in the water industry writes its P&P documents using an imperial tone (and other obsolete approaches) when its leaders are positioning the culture to become a learning organization of the early 21<sup>st</sup> century. This type of organizational culture values and promotes continuous process improvement, team problem solving, cross-functional team management and self-learning. I have suggested that the P&P writers shift from the future tense to the present tense to coincide with the way members of the organization speak and interact in the desired culture. They agreed.

Still another reason why P&P writers use *shall* and *will* excessively in documentation for their end users is because they have been given documents with excessive *shalls* and *wills* from which to work. Such documents are often intended as sources for intermediary P&P writers to adapt and rewrite for their end users. Intermediary P&P writers may typically receive their source documents from corporate headquarters, the government, a regulatory agency or a certification standards agency. Such entities may write to tell other organizations what shall, will or should be done. These recipient or intermediary organizations are not necessarily required to convey *shall* and *will* in writing to their audiences, yet they often do so.

One example of an intermediary organization involves the P&P writers for the county government that I mentioned earlier. These P&P writers received P&P documents filled with *shalls* and *wills* from a state government agency whose source was primarily federal and state legislation. One P&P

*Use of Shall and Will, continued on page 6*