Vol. 9, No. 1/Spring 2003

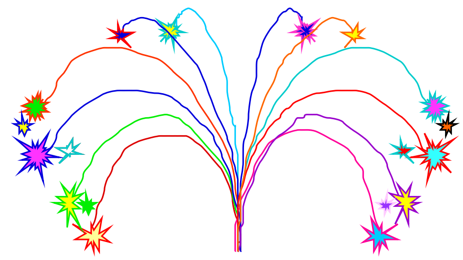
Steps&Specs

The newsletter of the STC Policies and Procedures Special Interest Group

STC SOCIETY FOR TECHNICAL COMMUNICATION

Policies and Procedures SIG Celebrates First 10 Years

By Raymond E. Urgo



As June 2003 approaches, we celebrate the Policies and Procedures Special Interest Group's first decade—a milestone opportunity to reflect on our accomplishments and our journey into the future. Our SIG has become the largest (more than 900 members) and longest existing group of people interested in policies and procedures communication.

In the beginning . . .

It was June 1993 at the Anatole Hotel in Dallas, Texas. The Society for Technical Communication (STC) was holding its 40th Annual Conference. During a networking luncheon focused on topics in technical communication, eight STC members met at a table designated for the topic of policies and procedures (P&P). At the end of their lively discussion, several members expressed the need for an ongoing dialog, sessions, and resources on policies and procedures within the Society. After everyone agreed to this need, I offered to spearhead an effort with their support to form a professional interest committee (we called them PICs before calling them special interest groups, or SIGs) on policies and procedures. They supported my offer. Within a year, we had gathered the signatures of 62 STC members (far more than required) who petitioned for the formation of the P&P PIC. In September 1994, the STC board gave its approval for the PIC.

As I think about our past 10 years, three things especially amaze me:

- How we have adapted the use of Internet technology to the operating and functioning as a SIG
- The amount and variety of accomplishments we have achieved for our members, our discipline and the organizations we serve
- The number of members who have volunteered and the variety of ways they have served the SIG

These three things were done as we operated virtually—physically distant around the globe.

Adapting Internet Technology

In 1993, the SIG was at the dawn of communicating by e-mail among our homes and offices. We corresponded mostly by mail and facsimile for administrative matters. The hardcopy newsletter, first published in April 1995, was our most essential means of communicating regularly with the SIG's membership. As our volunteer leaders

P&P SIG Celebrates, continued on page 3

In This Issue

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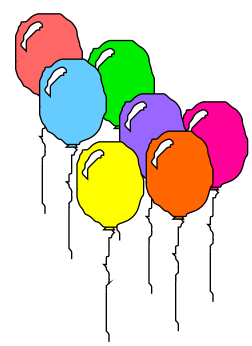
Manager's Report:

Happy Anniversary, P&P SIG

With this issue of *Steps & Specs*, we celebrate the 10th anniversary of the founding of the Policies and Procedures SIG. The journey to where we are today as a group specializing in P&P communication began with eight founding members. One of those founding members, Raymond E. Urgo, spearheaded the effort to secure Society approval for a P&P PIC (or professional interest committee as the SIGs were known in the early 1990s). Urgo also served as the SIG's first manager. He set the SIG on a course marked by numerous achievements, increases in membership, member involvement, and an increasing presence and visibility at STC annual conference sessions. As we embark on our second decade, I'm confident that we can continue to build on the strides he and other volunteer members over the years have forged.

The issue is packed with articles related to the SIG's history, where it is today and even some insights into what lies ahead for it in the future. To get a good understanding of all of these aspects, be sure to read Urgo's article on page 1. Learn about how the SIG came to be and the many milestones in its lifetime. There also are three member profiles—two from newer members and one from a veteran member and current SIG volunteer. And there are a couple of articles related to the craft of P&P communication.

If you will be attending the STC's 50th Annual Conference in Dallas, Texas, this May, be sure to stop by the SIGs table in the exhibit hall to pick up a commemorative button and display it proudly on your shirt or tote bag. Let's celebrate.



Check it Out...

The P&P SIG's Web site is up and running and ready for visitors. Visit the site at the following address: http://www.stcsig.org/pp.

Comments? Suggestions? Contact Janice Haskins at davejan@ibl.bm and let our Webmaster know what you think.

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 pportunities, STC conference sessions and publications, and communication with other STC SIGs and professional organizations in areas of common interest.

P&P SIG Celebrates, continued from page 1

eventually obtained their first e-mail addresses for use on the Internet, we more quickly and efficiently corresponded through e-mail messages. We then gravitated toward attaching documents to our e-mail. That was revolutionary for us then.

Our next stride was the creation of our first Web site in 1997. Our site enabled us to promote our existence and share our resources about our specialty to the world at all times. In 1998, we established our Listserv. For the first time, our members could collectively collaborate electronically in an asynchronous manner on topics of interest concerning P&P.

While each of these adaptations to technology brought welcomed value and benefits, we must credit ourselves for taking the necessary strides required to self-learn and inform others on how to progress. Achieving these strides was not always easy as we collaborated, physically separated across time zones and with no previous experience. Our successful adaptation to evolving Internet technology has enabled us to grow and function across time zones around the globe.

Accomplishments and Value

In terms of accomplishments and value in P&P interests, we created the world's first Web site, Listserv and longest-existing published newsletter covering P&P concerns. We have the broadest membership of P&P specialists represented across industries and around the globe. Our existence has been the reason why some people join and remain in STC.

Our Listserv has been a means of communicating information on an estimated 50 topics of discussion. The Listserv has brought members together quickly across time zones to share ideas, suggestions, resources, opinions and support involving P&P concerns.

Through our newsletter, *Steps and Specs*, we have published about 30 editions. *Steps & Specs* has provided readers with nearly a dozen book reviews, 50 feature articles, 10 member profiles, and more than 80 news articles and announcements about the SIG and events associated with P&P. Our newsletter editors have won awards on numerous occasions for this fine and essential publication.

Because of our existence, other STC members and non-STC members have contacted our SIG for assistance, direction, resources, explanations and research concerning P&P communication. In 10 years, we have responded to more than 100 requests.

P&P SIG Celebrates, continued on page 7

2003	SIG Membership tops 900; SIG presents at STC Annual Conference
2002	SIG presents at STC Annual Conference
2001	SIG presents at STC Annual Conference
2000	SIG presents at STC Annual Conference
1999	SIG presents at STC Annual Conference
1998	SIG's Listserv introduced; SIG presents at STC Annual Conference
1997	SIG's first Web site goes online; SIG presents at STC Annual Conference
1996	SIG presents at STC Annual Conference
1995	SIG presents at STC Annual Conference for first time
April 1995	SIG's first hardcopy newsletter published
Sept 1994	STC approves formation of P&P interest group
June 1994	62 petition signatures collected in support of a P&P interest group
June 1993	Initial discussion at STC Annual Conference about creating a P&P interest group; eight founding members comprise the SIG; members begin communication via e-mail

A Brief P&P SIG Timeline

Book Review: *Writing Effective Policies and Procedures: A Step-by-Step Resource for Clear Communication*

By Nancy J. Campbell

Editor's Note: The following book review comes from the American Management Association's Web site at http://www.amanet.org/books/catalog/081447960X.htm.

Policies and procedures—they're what make a company run efficiently and legally. Now managers have a definitive guide to creating accurate policies and procedures documents. The book is useful for professionals in such areas as:

- Health and safety
- Human resources
- Office management
- Administration
- Quality
- Manufacturing
- Customer service
- Finance and accounting

Readers will enjoy the unusually friendly, informal approach of this book. Loaded with examples, checklists, guidelines, quick tips, work plans and forms, it is ready for immediate use. The book shows how to:

- Write and design documents clearly so employees will understand and follow the policies
- Plan, analyze and research each element
- Help employees increase efficiency, reduce mistakes and frustration, and save time and money by providing clear guidelines to follow
- Avoid legal mistakes that can get a company in trouble

Nancy J. Campbell of Kansas City, Missouri, is a trainer, facilitator and speaker specializing in the development of management skills to enhance employee performance.

Third Speaker Needed

A third speaker (replacement for a panelist who had to withdraw) is needed for the STC Annual Conference panel "Estimating Time and Cost for Policies and Procedures Projects." It is scheduled for Monday from 11 a.m. to noon in Grand Ballroom E. Below you will find more information about the panel. If you want to join the panel, e-mail your SIG manager, Audrey Cielinski Kessler, at audck@aol.com now.

Panelists will discuss ways to estimate the time and financial resources needed to complete a policy and procedure project and the challenges involved in doing so, including fees and cost and time overruns. The moderator will ask the panelists questions that are intended to generate comments and questions from the audience.

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

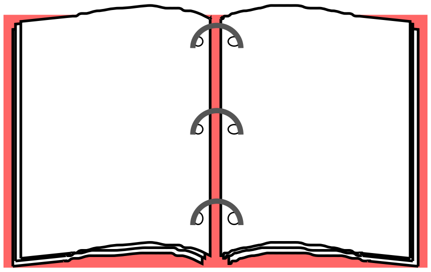
- What is the biggest challenge in estimating the time required of a project?
- Did your company ever quote a flat fee, and the project took much longer than estimated? What did you do?
- How does your company bill for project management time?
- What are the biggest time and cost surprises?
- How do you ask about money available for a project?
- What is the difference in estimating time and cost for policy and procedure documentation and any other documentation project?
- Do you always give the requestor (e.g., business unit, client) the exact number that is derived on your estimate?
- How do you include all of the little things (such as editing, page layout) in your estimate?
- Is it really cost-effective to document policies and procedures?

Web Site Offers Tips for Writing Policies and Procedures for Business

Editor's Note: These tips on writing policies and procedures for business are from an article found at http://www.green-office.com/info/dyk_writingpandp.htm.

A well-written employee manual lets your employees know what's expected of them and what they can expect of you. When creating the manual, consider these tips:

- Involve front-line managers when putting together a policy and procedure manual as they will be administering the policies.
- Include statements that show your commitment to applicable state and federal laws in areas such as new-hire reporting, equal employment opportunity, exempt and nonexempt employees, harassment, wages and anti-discrimination.
- Discuss mandated benefits such as Social Security, workers' compensation, unemployment, employee leave (military, jury and family) and school visitation rights.
- Outline company policies, such as time-keeping, pay schedules and confidential information; use of mail, phone and e-mail privileges; probationary period; performance reviews; and standards of conduct.
- Offer information on benefits, such as holidays, vacation, retirement plans, insurance, leaves of absence and stock options.
- Replace don'ts with dos. Use positive statements to describe company policies. Instead of telling employees what they cannot do, emphasize what they are expected to do.
- Write clearly, and keep the list of dos and don'ts reasonably short. Too much legal jargon will confuse your employees.
- Be careful in your use of language. You don't want to inadvertently create a legally binding contract. Avoid using words such as *always*. Use instead words such as *generally* and *usually*. Leave room for the exceptions to the rule.
- Have an employment law attorney review your manual before you issue it. This can save you thousands of dollars by protecting you from lawsuits down the road.
- When the manual is done and in employees' hands, have them read it from cover to cover and sign a statement saying they have done so. This will let you avoid confusion later.



Get Involved

There are lots of ways to be involved in the sharing of information within the P&P SIG.

One way is to submit your bio. This would be a good place to introduce yourself, describe your expertise, and share your specific interests in policies and procedures. We will use your bio on the SIG's Web site and will feature one or more P&P members each quarter in the SIG's newsletter. Just a few lines are necessary: your name, position, background, experience and any special challenges you face.

Another way is to submit questions and their answers for the FAQ feature of the SIG's redesigned Web site.

Both of these are easy ways to be involved and will also serve as a great way to share your knowledge with others and to network.

Interested? Contact Audrey C. Kessler at audck@aol.com or 330/677-8598 or Kathy Craddock at dizsuitsme@aol.com or 919/966-7904 for more information or to submit your bio or FAQ.

Sharing Your Expertise: Listserv Contributions

Editor's Note: A post on the P&P SIG Listserv asked members to share their advice on estimating the time and cost of a technical writing project, in particular, estimating the time needed to write procedures when you don't know the procedures yet. The original, verbatim post and responses follow. For more information on estimating projects, join your fellow P&P SIG members at the STC 50th Annual Conference. The SIG is hosting a panel discussion, "Estimating Time and Cost for Policies and Procedures Projects," Monday, May 19, from 11 a.m. to noon. See page 8 for more information.

Topic: Estimating Time and Cost of Technical Writing Projects

My name is Sally McBeth, and I manage a consulting service called Clear Language and Design. We edit policies and procedures for a great range of organizations, both public and private sector. Recently, I was asked to write a group of internal administrative procedures for a mutual fund company. They had a five-year-old manual, and I ended up having to write almost everything from scratch, interviewing the user and then documenting the procedure.

My question is for those of you who estimate the time and cost of technical writing, either as freelancers or for internal clients. How do you do it? With editing, it's easy—you base it on the number of manuscript pages. How do you accurately estimate the time to write procedures when you don't know what the procedures are yet?

I ended up about 10% over the original cost I quoted my client, and they seem to be okay with that, because they like the work. In fact, I think they are going to ask me to prepare another bid. I would dearly like to feel as though I am standing on solid ground next time. All advice gratefully solicited.

Sally McBeth

Greetings,

This seems to be the most difficult part of any project, to be sure. The situation you describe fits the bulk of work our team does.

I am giving you the quickie, nutshell version of how we deal with it. We do not stray from this approach unless the job is small and **obviously** manageable. I am definitely open to more discussion supporting this issue (interviewing methods and skills, user-centered design, estimate preparation).

We never give our cost estimates in one number. We itemize the estimate to include at least three phases (phases will be added depending on the complexity of the project).

Phase Zero: Interviewing and other information gathering:

- Determine the needs and expectations of the client.
- Business (cost, purpose, time line).
- End-user (access, interface).
- Technical/Technology (features, future direction).
- Delivery (Web, PDF, hardcopy, e-mail).
- Training (on-line, in-person, slides, Web-based).
- There are other items here, but you get the idea.

Phase One: Development and testing

Phase Two: Delivery and roll-out.
The cost estimate for Phases One and Two depends on the findings in Phase 0 [zero], although an estimate with a caveat can certainly be provided prior to completing the interviews (when we do this, we generally take our best guess and double or triple it depending on the complexity of the project).

Most of our clients are in the following industries:

- Oil and Gas
- Healthcare
- Financial
- Education
- Retail

Kristie Falvey

* * * * * * * * * *

Sally,

I received my technical communications certificate from DeAnza College, Cupertino, California. One of the instructors, Lyn Smirnov, is a Technical Communications Department manager in the high-tech industry, and here is the formula she gave us:

4 hours / page = x, + 15% of x for editing, + 15% of x for project management, + 4 hours per graphic = total hours. Total hours x rate = cost.

Estimating the number of pages you expect the project to be is another challenge. When starting a document from scratch, an estimate has to start with an outline. From the outline, with the client's input, you can estimate the number of pages each heading may take.

Good luck, and have fun!

Shirley Smith

* * * * * * * * * *

Hello Sally,

My name is Steve Mercer. I have been out of town and only recently got back and retrieved my e-mails. I saw yours in

Listserv Contributions, continued on page 8

P&P SIG Celebrates, continued from page 3

Thinking back to our founding and charter members, I don't believe any of them would have thought then that we would have accomplished so much while bringing so much value to ourselves and other organizations.

Volunteers Who Make It Happen

So who were and are the volunteers who have made the SIG and its accomplishments happen? Since 1993, more than 50 STC members have generously volunteered to assist the SIG in a variety of ways. Nearly 20 have filled leadership positions, five have served in supportive positions, 40 have written at least one article for *Steps & Specs*, and 30 have delivered at least one presentation sponsored by the SIG at an STC annual conference.

Most impressive is not just how much we have grown and what we have achieved but the stability and consistency in our ongoing leadership, membership, operations, publications and sponsorship of conference presentations. When one considers that a purpose of P&P communication for an organization is to inform others how to perform predicable activities with consistency, it is interesting to see how predictable and consistently led, managed and productive we have been.

We have had an abundant, stable and dedicated leadership. More than 20 members have volunteered their time to fill leadership positions during our existence. We have always had our manager position filled and our other leadership positions have been filled almost continuously. Noteworthy is the long-term involvement of many of these people, such as Audrey Cielinski Kessler, our manager since 1998 and the first newsletter editor before becoming manager.

In addition, we have consistently published our newsletter four times a year through the efforts of our volunteers. Every year since 1995, we have coordinated and sponsored presentations on P&P topics at STC's annual conferences.

During our first 10 years, the P&P SIG has consistently been rated as "above average" or "excellent" in meeting STC standards for the functioning of a SIG. These ratings are a reflection of our volunteers' interests, passion and efforts toward serving the mission of the SIG.

What Next?

I see our first 10 years as being mostly about creating the infrastructure and operations for our membership growth and communication as a virtual group of members interested in P&P. I would like to see us focus the next 10 years on research and development of P&P as a discipline and as a value-added specialty to the development and performance of organizations. We need research about P&P practitioners—their backgrounds, roles, values, positioning and marketability. We also need research to show the important difference that P&P communication can have in jobs, organizations and industries. At the same time, we need to develop and enhance our informational resources about our discipline. These resources could then be used to help enhance our members' talents and the needs of other organizations seeking our assistance.

To continue to be a viable group, we especially need volunteers who want to lead and explore P&P communication as a subdiscipline within the field of technical communication. We need people who are passionate about their work and interest in P&P communication.

The better we know and understand our past, the more we can create our future. I urge our members to take a step forth and lead efforts to examine our members' P&P interests and accomplishments in order to create a body of knowledge about P&P practitioners. The 30 editions of our newsletter contain a wealth of information to research. For example, our newsletter holds profiles on nearly a dozen members. A research study might examine whether there are any similarities in what makes a P&P practitioner—something we could then offer as a knowledge base so others can exemplify or model their backgrounds. The possibilities go on.

Closing Thoughts

From eight founding STC members in 1993, to 62 STC petitioning members in 1994, to more than 900 STC members in 2003, we are a strong group of P&P specialists. In closing, I thank each of you for your support in making the STC P&P SIG a viable reality. I also encourage you to congratulate yourself and the SIG's volunteers for their efforts that continue to make our SIG strong and ready for the future. Finally, please join me in wishing our P&P SIG a very happy 10th anniversary!!!!!!!!!! (That's 10 exclamation points, or 10 upside down candles.)

Raymond E. Urgo is the principal of Los Angeles-based Urgo & Associates, specializing in policies and procedures consulting. He is the founder and first manager of STC's P&P SIG. He can be reached at rurgo@urgoconsulting.com.

Deadline Reminder

The deadline for submission for the summer issue of ***Steps & Specs*** is May 15.

E-mail submissions to Kathy Craddock at dizsuitsme@aol.com or call 919/966-7904 for more information.

Join Your SIG at STC's 50th Annual Conference

By Kathy Craddock

The STC 50th Annual Conference is in Dallas, Texas, this year. Plan on joining other P&P SIG members for the following P&P-related sessions. The annual conference is a great time to catch up with old friends, make new ones and network with your peers. For more information on the STC 50th Annual Conference, go to the official Web site at http://www.stc.org/50thConf/index.asp. There you will find all the information you need on the opening session and keynote speaker, conference sessions, conference extras, the exposition, host chapter, closing session, and travel and accommodation information.

Technical Sessions

Topics in Policy and Procedure Communication
Progression
WE 6B Tuesday 11 a.m.-Noon

Location: L'Entrecote

In this progression, review a range of P&P topics, including organizing documentation, combining or separating P&P documents, and historical aspects of P&P communication.

Moderator:
Audrey C. Kessler, *The Write Hand of Ohio*

Presenters:
Cheryl Hultiquist, *Stanford Linear Accelerator Center*
Dawnell K. Claessen
Karina J. Ritchie
Ralph E. Robinson, *Appendix Publishing Inc.*
Raymond E. Urgo, *Urgo & Associates*
Barbara Scott Zeller, *TCF National Bank*

Estimating Time and Cost for Policies and Procedures Projects
Panel Discussion
MG 2Z Monday 11 a.m.-Noon

Location: Grand Ballroom E

Moderator:
Audrey C. Kessler, *The Write Hand of Ohio*

Speakers:
Adrienne S. Escoe, *Escoe Bliss Communication*
Raymond E. Urgo, *Urgo & Associates*

Policies and Procedures Communication 101
WE 4U Monday 4 p.m.-5 p.m.

Location: Manchester

Gain an overview about communicating P&P and the P&P discipline. Learn about the fundamental purpose, principles, techniques, vocabulary, trends and resources for P&P. Discover opportunities and roles for P&P practitioners.

Leader:
Raymond E. Urgo, *Urgo & Associates*

Annual Conference, continued on page 10

Listserv Contributions, continued from page 6

which you were asking about estimating procedures.

Since I have the same issue, I have been working on a project to construct a comprehensive system of estimating projects, and then comparing the estimates to actual. The central core of the estimating system is built in Excel and divided up into various tasks based on various types of tasks and projects. For each task, the estimated time is entered; at the end of the project, the actual time is entered in a cell next to it, and the differences are measured. A companion Word document addresses qualitative issues and includes a Lessons Learned section. The objective is to become skilled at targeting project times and costs, no matter what type of project or tasks are involved.

I hope this is helpful to you. If you have any other questions or would like to share input, let me know. Until later, take care.

Best regards,

Steve Mercer

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I'd like to thank everyone who gave me advice on estimating for technical writing. Many of you recommended Joanne Hackos' book *Managing Your Documentation Projects.* I'll definitely be going out and getting that.

Thanks again, everyone.

Sally McBeth

The Ups . . . and Downs of P&P SIG Membership

By Candie McKee

When the Policies and Procedures SIG began operating as an STC PIC (Professional Interest Committee, as the SIGs were known then) and published its first newsletter in April 1995, membership totaled more than 170. At that time, the PIC's membership team was under the leadership of Kevin Schmidt.

By the following quarter, in September 1995, Jerry Laing assumed the membership team leader position and set four goals for the team: create a welcome letter for new PIC members, conduct a membership survey, and create a membership profile and membership directory. By December 1995, the PIC's membership had increased to 210 in four months. For the nine months the PIC had been in existence, membership had increased 200 percent. In addition, the membership survey and welcome letter were created and mailed.

The March 1998 membership report showed that the group had topped 100 new members in one quarter. Knowing a good thing when they saw it, 175 more people joined between February and April 1998, bringing the total to 424.

In June 1996, the P&P PIC had about 280 members. Over the years, the ranks swelled by around 238 percent before suffering a recent decline.

In December of 1996, membership already had increased by 12 percent, to 315 members. Kevin Schmidt rejoined the membership team that month to assist with enrollment and welcome letters.

By July 1997, membership was up to 350 and climbing fast. It was in this year also that PICs became SIGs, or special interest groups. The change in name, however, didn't slow enrollment in the group. The March 1998 membership report showed that the group had topped 100 new members in one quarter. Knowing a good thing when they saw it, 175 more people joined between February and April 1998, bringing membership to 424. By December 1998, Joy Osaka-Lu had joined the membership team. The ranks of the P&P SIG by that time had reached 549 members.

In March 1999, Osaka-Lu and SIG Manager Audrey C. Kessler developed a new member interest/volunteer sign-up card to be included in new-member packets. The cards were used to record personal data, new members' interest in the five SIG teams in place then, and comments and feedback. Not leaving the veterans out, the cards also were included in the quarterly newsletter so current members also could complete and return them.

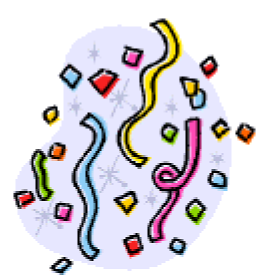
With membership hitting 695 in June 1999, it was time to begin showing a breakdown by country or continent in the newsletter. That month, the newsletter showed membership from citizens of Asia, Australia, Canada, Europe, the United Kingdom and the United States. By September of that year, membership had increased to 806 and included people from Israel, Saudi Arabia, Finland and India. At the end of the quarter, Laing stepped down as membership team leader and handed the reins to Osaka-Lu. Membership totals were at 840 by the close of the year.

In December 2000, Candie McKee assumed the position of membership team leader. By this time, there were more than 1,130 P&P SIG members. Membership reached its high point of 1,165 in March 2001.

With membership hitting 695 in June 1999, it was time to begin showing a breakdown by country or continent in the newsletter. That month, the newsletter showed membership from citizens of Asia, Australia, Canada, Europe, the United Kingdom and the United States.

With the worldwide economy slumping since the September 11, 2001, terrorist attacks in the United States, it is not surprising that the SIG's membership has declined slightly over the past months. The June 2002 membership report had 900 members on the SIG's roster. Since then, membership has averaged between 900 and 1,000 members.

Candie McKee is currently working on her Ph.D. at Oklahoma State University and is a member of the Oklahoma chapter of STC.



Happy 10th Anniversary P&P SIG

Annual Conference,
continued from page 8

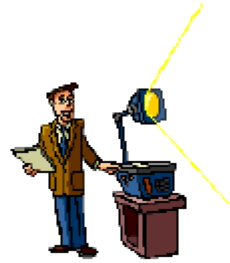
Experiences with Online Policies and Procedures Information
Panel Discussion
WE 5T Tuesday 8:30 a.m.-10 a.m.

Location: Grand Ballroom D

Learn from a moderated panel discussion the important concerns, issues, obstacles and triumphs that three organizations encountered with their transition to having their policies and procedures online.

Moderator:
Raymond E. Urgo, *Urgo & Associates*

Speakers:
Diane M. Garcia, *Wescom Credit Union*
Cheryl Hultiquist, *Stanford Linear Accelerator Center*
Jill A. McCauslin, *RADCom, Inc.x*



Online Documentation: PDF, HTML or Something Else
Panel Discussion
WE 9T Wednesday 8:30 a.m.-10 a.m.

Location: Morocco

Panelists discuss the different methods of producing online documentation, the pros and cons of each, and strategies for choosing among the various options.

Moderator:
Edward J. Frost, *Ringwood Software Inc.*

Speakers:
Edward J. Frost, *Ringwood Software Inc.*
Julia T. Margulies, *Merck & Co. Inc.*
Dana F. Utz, *Sungard Treasury Systems*

SIG Business Meeting

The SIG's annual business meeting will be held on Tuesday, May 20, from 7 a.m. to 8 a.m. in the Inverness room. This annual meeting is a great opportunity for you to meet with the SIG manager and discuss things you would like to see happening within the SIG. Grab a cup of coffee, make your breakfast a quick muffin or pastry "to go" from one of the restaurants in the Atrium, and then head over to the Inverness room and join other SIG members for a lively discussion.

SIG Networking Lunch

The annual SIG networking lunch will be held on Tuesday, May 20, from 12:15 p.m. to 2 p.m. Preregistration and ticket purchase is required. This is a wonderful way to network with other SIG members and catch up with old friends. See the program schedule for more details.

Making the Most of Your SIG Membership: Subscribe to the Listserv

To Subscribe:

Option 1:
Send an e-mail to subscribe-stcppsig-l@lists.stc.org [note that the character before the "@" is a lowercase letter "L"—not the number one].

Option 2:
1. Send an e-mail to lyris@lists.stc.org
2. In the body of the e-mail, type the following: subscribe stcppsig-l <your name> [note that the arrowhead brackets are not part of your entry and that the character after the hyphen in the list name is a lowercase letter "L"—not the number one]

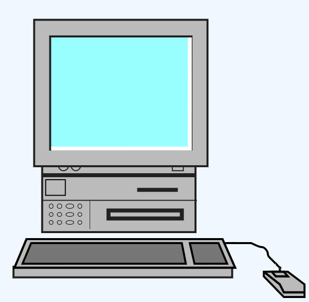
To *Un*subscribe:

Option 1:
Send an e-mail to unsubscribe-stcppsig-l@lists.stc.org [note that the character before the "@" is a lowercase letter "L"—not the number one].

Option 2:
1. Send an e-mail to lyris@lists.stc.org
2. In the body of the e-mail, type the following: unsubscribe stcppsig-l <your name> [note that the arrowhead brackets are not part of your entry and that the character hyphen in the list name is a lowercase letter "L"—not the number one]

To Post to the List:

Send an e-mail to stcppsig-l@lists.stc.org. Type a subject title. In the body of the e-mail, type your message.



Member Profile: Candie McKee

Editor's Note: This quarter, Steps & Specs *is pleased to introduce Candie McKee, head of the SIG's membership team.*

S&S*:* Can you briefly describe your background for our readers?

CMcK*:* In 1995, I graduated from the University of Central Oklahoma with a B.A. in English with an emphasis in Composition and started a technical writing internship at a local retail software company, Applied Intelligence Group. It is here that I met my mentor, Suzanna Laurent. In 2000, I graduated with my M.A. in English with an emphasis in traditional literature. Currently, I am working on my Ph.D. at Oklahoma State University with an emphasis in technical writing.

I have worked as a technical writer in a variety of industries, including telecommunications, health, manufacturing, software and academia. One consistent writing style across the industries has been policies and procedures, which is why I have been active in this SIG. In addition, I have been fortunate that I have also worked in a variety of media. Policies and procedures is a genre that can be presented in a variety of media, helping to keep my job consistent with a touch of change.

Over the past eight years, I have developed a genuine love for technical communication. I cannot imagine working in any other profession.

S&S: Tell us about your responsibilities.

CMcK*:* Currently, I am working mostly in academia. With my class schedule, I usually take contract work on the side during my breaks. This summer, I worked for the Oklahoma Department of Human Services (OKDHS).

My responsibilities included:

- Establishing policies and procedures for documentation in all areas of the organization
- Establishing policies and procedures for the HR department
- Creating new policies (based on the Project Management Institute's standards) for the Project Management Team, including new templates that presented a professional, unified design

Furthermore, I am working with OSU-OKC to set a standard curriculum for their technical report writing.

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

CMcK*:* I like everything about technical communication, to be honest. The changes in industry have created a constant challenge. I love the ways policies and procedures are consistent, yet different across industries and how my varied background has allowed me to continue to learn. In academia, I love being able to introduce students to all aspects of technical communication because it is so misunderstood by other professions.

S&S: What are some of your major achievements in P&P communication?

CMcK*:* This question is the hardest to answer. Working for OKDHS is the job about which I am the most proud. The group was making significant changes in its policies and procedures. My prior experience allowed me to offer a variety of options not only in style but also guidelines.

Teaching also is a great achievement. The opportunity to share with others is a great feeling. I even use *Steps & Specs* in my classroom environment.

S&S*:* How did you become involved in P&P communication? Was it by design or by default (by accident)?

CMcK: By default. During an internship, I was introduced to all types of technical documentation. As I changed jobs, policies and procedures continued to be a major focus in my work responsibilities.

S&S*:* When someone asks you, "What do you do?" what do you say?

CMcK*:* I tell them I work in all areas of the company to help develop policies and procedures that are beneficial for both management and other team members. Developers really like this part of my job because project managers and developers work so differently, as we all know, and my ability to help them understand the needs of the other is always well received.

S&S: How do you define P&P?

CMcK: Policies and procedures are the documents that help people streamline their work process, assist in collaborative projects, and provide important information in the most effective and efficient way.

S&S: What makes you a good P&P communicator?

CMcK*:* Many people say English is the main requirement; however, I tend to disagree. I believe my ability to communicate with associates in all areas of the company is the most important skill. I can talk with anyone, anywhere, anytime. I also take my knowledge level very seriously. It is important to me to understand what I write about. I ask questions, even if they sound uninformed. If I have those questions, I know users/readers will too.

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S&S: What advice would you give someone who wanted to get into P&P documentation?

CMcK: Learn everything you can by asking the questions you think others will not ask. Talk to everyone. Find out their needs and expectations. Give them solid, dependable information about how to develop policy and procedure documentation. Always, always, always be open and receptive. If you are, others will be too.

S&S: Tell us about your role in STC and how that has changed in the last few years.

CMcK: In the past, I have been very active in STC, especially the Oklahoma Chapter. I have served in almost every office in the chapter. Outside of the Oklahoma chapter, I have presented at several conferences and served as the Region 5 Public Relations chairman this past year. For several years, I have served as the membership chairman of this SIG.

S&S: What do you like to do outside of P&P?

CMcK: As mentioned, I teach. In addition, I spend time with my 11-year-old daughter, Kelsey. We usually spend time reading, rollerblading, painting or playing PS2.

Candie McKee can be reached at candiemckee@sbcglobal.net.

New Members to the P&P SIG

Editor's Note: Steps & Specs *is pleased to welcome two of its newest members in this anniversary issue. Yochanan Koelewyn is from Jerusalem, Israel. Koelewyn notes that "A TC's life is so busy, a week goes by as if it were a day. So finally, with a storm brewing outside and the children asleep, I attend to unanswered mail." James McGowan is a member of the Toronto Chapter of the STC. McGowan joined as a student because he is currently studying to become a technical writer at York University (Glendon Campus) and will be completing his certificate shortly. We welcome Yochanan, James, and our many other new members.*

Yochanan Koelewyn

S&S: Briefly describe your background for our readers.

YK: In the past, I've spent some years developing and managing an industrial plant. I've run a successful studio producing architectural models. I teach (occasionally) at technical schools. I spend time in my workshop teaching my children about tools and practical skills.

S&S: Tell us about your current responsibilities.

YK: To begin, I want to tell you about a wonderful Technical Communications Convention organized by my STC chapter in Herzeliya-on-the-sea that was held late in January of this year. During an entire day, fastidiously scheduled, some two hundred of us learned and enjoyed the lectures from the best technical writers in their fields in Israel. We expect to use this experience to put on another convention next year.

I joined the P&P SIG when I submitted my new membership to STC, having watched from the sidelines for some time.

My P&P activities are probably extremely limited. However, I have the good fortune to be in a software firm that slowly evolved from somewhat chaotic methods to the organized and procedure-conscious company it is today. During this time, I have taken part in writing procedures and working instructions and the QMM (quality master manual), from which inspiration flows.

Currently, I am responsible for documentation in the R&D department and ready our department for periodic quality assessments and audits by external organizations such as ISO and FDA.

S&S: How did you become involved in P&P communication? By design or default (by accident)?

YK: I became involved in P&P by default. There were no technical communicators available, and a quality system needed to be built, so I was asked to join the team.

S&S: How do you define P&P?

YK: Create the means for an ordered environment where a quality system can grow and be effective.

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Talk Back . . . Sharing Your Thoughts on Common P&P Issues

By Kathy Craddock

Editor's Note: As part of this anniversary issue, Steps & Specs *is soliciting responses from our members—veteran and new—for a new feature called Talk Back: Sharing Your Thoughts on Common P&P Issues. I invite you to share your responses on the following question:*

How do you work effectively with your SME (subject matter experts)?

Consider the following:

- *What techniques do you use?*
- *How do personalities work for or against you?*
- *How do you know when you are being told the truth?*
- *How do you overcome the obstacles that SMEs can create?*

Here's what two of your colleagures have to say:

Raymond E. Urgo

Urgo, principle of Urgo and Associates in Los Angeles, provides the following insightful information:

What techniques do you use?

I focus first on who they are (whether themselves or others) and then on what tasks they need to perform or "how to do." Then I ask what the users need to know about each task to perform it. I may get this through an interview or a draft.

How do personalities work for or against you?

I'm not sure I have issues with personalities. I go into a project realizing that some SMEs have different working priorities, issues and concerns than mine. I attempt to show respect to their working and communication styles. And I really don't have an issue with personalities.

How do you know when you are being told the truth?

I'm not sure I ever had an issue about the truth; rather, differences in perscpective or understandings of an issue.

How do you overcome the obstacles that SMEs can create?

The more common obstacle I may encounter is someone not getting back with information or a review. If after several attempts I get no response, I make it known to my contact for the project engagement. And if still nothing happens, I just move on.

Sue Wolford

Wolford, manager of methods and procedures at Chase Manhatten Mortgage Corporation, adds a humorus spin to her thoughts. She sees it as SMEs and the Big Top.

There is a lot about writing that reminds me of performance art. As I was pondering the topic of working with subject matter experts (SMEs), I looked at my list of what makes us successful, and I found that the most important skills involve having smooth moves, amusing the crowd and rewarding those who performed well. It's . . . it's just like working in the circus!

Ever work with people on the trapeze? If you flatter them long enough, if you're smooth enough, they'll give you the secrets on performing the most dangerous moves. With flattery, you can take what they give you, write about it, and they won't even realize they've given you what they wouldn't tell you three weeks ago.

Think about the lions. How do you get to the point where they let you put your head in their mouths? Rewards. Behave and perform, and they get raw beef. Dogs do it for biscuits. People do it for chocolate. It always pays to have a bag of Hershey bars in your desk.

For some people, it's the women riding around in a circle while standing on a horse that brings them to the circus. Others like the elephants. For some it's the clowns in the little cars. You're a procedure writer! You've done more difficult things than that! You can do all these things; you just have to pick the right trick for the right audience member.

After making the most difficult, intricate moves, there are bold audience members who will always help you with tips on how to make your act better. Never turn away the critics. Thank them for their help, incorporate their suggestions into the final act, and make them think they're responsible for your success.

Occasionally, what we do is like following the elephants. So, keep your shovel handy and watch where you're stepping.

Want to Talk Back?

Steps & Specs invites your commentary on the topic in this issue.

E-mail your comments to Kathy Craddock at dizsuitsme@aol.com. Responses will be published in the next issue of ***Steps & Specs***, and a new topic for discussion will be included.

Let us hear from you.

Wanted: Successor for P&P SIG Manager

Next fiscal year (July 1, 2003), the Policies and Procedures SIG manager position will be available. The manager position is an excellent opportunity to learn or polish managerial and leadership skills, and play a significant role in a special interest group and in the Society as a whole.

The position requires the following:

- Good organizational skills
- Ability to consistently meet deadlines
- Ability to work well with and motivate other members of the SIG leadership team (e.g., newsletter editor, Webmaster, membership leader)

Tasks of the of the current manager have included the following:

- Organizing and/or maintaining a leadership team
- Reviewing and signing off on each newsletter issue
- Approving major updates to the SIG's Web site
- Preparing and submitting a SIG-sponsored presentation proposal for the STC annual conference (includes brainstorming topics, finding speakers, writing the proposal and submitting the required documentation and forms)
- Deciding how the SIG's budget is allocated
- Approving and processing requests for reimbursement
- Preparing a simple and brief quarterly status report on the SIG and its activities

Assistance to the new manager will be provided during a transition period and afterward as needed. The tasks you choose to undertake as SIG manager may vary from those listed above. If you would like to be considered for this position, please send a letter of interest and qualifications to audck@aol.com.

For questions or additional information, send an e-mail to the same address or call 330/677-8598.

Audrey Cielinski Kessler
Manager, Policies and Procedures SIG

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S&S: What advice would you give someone who wants to get into P&P documentation?

YK: How to get into the field? I don't know. I suspect one needs to like order and resonate with the joy of building something.

James McGowan

S&S: Briefly describe your background for our readers:

JMcG: I have a bachelor's degree in English from Carleton University in Ottawa, a diploma in object-oriented programming from Diamond Institute of Computer Technology in Ajax, Ontario, and am currently in my last semester in a technical communication certificate program at York University. Technical communication seemed like a logical step for me, combining my English and language skills with my geeky computer tendencies.

S&S: Tell us about your current responsibilities.

JMcG: I am currently providing technical support for a software company in the Toronto area, and as yet am not involved in producing any documentation. My duties keep me so busy I cannot find time to do anything else.

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

JMcG: Since I am not currently doing much related to technical communication I don't know if I can rightly answer this question, but I enjoy the people I work with.

S&S: How did you become involved in P&P communication? By design or default (by accident)?

JMcG: Although I am actually not involved in P&P communication as of yet, it is one area that fascinates me. I am a firm believer in strong policies and procedures that make a healthy and safe workplace for everyone.

S&S: How do you define P&P?

JMcG: I think of P&P as being the glue that holds an organization together. They define roles and regulations, set guidelines for employees to complete their tasks and are a much needed component of that "well-oiled machine" that employers strive for in their organizations.

S&S: What do you like to do outside of P&P?

JMcG: I enjoy spending time with my family. I am the proud father of a beautiful 6-month-old girl. I also enjoy reading the classics, playing on the computer and the Internet, and listening to music.

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