

Steps & Specs

The newsletter of the STC Policies and Procedures Special Interest Group



Four Generations of Policies & Procedures Communication

By Raymond E. Urgo

From which era are your organization's policies and procedures (P&P) information derived or do they most resemble? Which era do you want them to resemble or do you want your work to reflect?

The styles, formats, and other characteristics of many P&P documents in today's organizations tend to resemble those derived from past eras and usually unconsciously or by default – "because it's always been done this way (or elsewhere) before." For example, I have known one fast-growing, ten-year old, entrepreneurial company in the high-tech industry whose P&P resemble those of 40-year old highly bureaucratic companies in regulated industries, simply because they adopted a traditional approach out of convenience and ignorance. I know of instances whereby P&P specialists replicated their formats and styles from one company or industry into another. Nothing is wrong with any of these situations, except these organizations were unfortunately not taking full advantage of formats, styles, and characteristics more conducive and reflective of the communication needs of the times and the organization.

The purpose of this article is to present four eras for communicating P&P information (mostly in the United States) so you can discern which era

your organization's P&P information might resemble and see where it may evolve. Also, it is always helpful to have an understanding and an appreciation of the roots of one's discipline.

My research, experience, and observations in P&P Communication lead me to identify four generations for this discipline. These four generations are summarized in the accompanied table. For each generation, the table shows two factors that I believe have and continue to have a significant influence on P&P communication: organizational characteristics of the era and the technology available during the era for developing and communicating P&P information.

Organizational characteristics of the eras address what the predominant focus and operating concerns were for organizations at the time. For example, during the 1950s emphasis was placed on auditing and controlling finances as a major resource, thereby making an accounting department a prime place for a mid-size company to host its P&P information development. The writing style of this era tends to be compliance based. By the 1980s, the emphasis shifted to managing information as a resource, thereby making an information systems department the likely host for a mid-size company's P&P development.

The writing style of this era tends to be either compliance or performance based depending upon the organization's astuteness to the times.

The technology available for developing and communicating P&P information has influenced the who, the what, the how, and the where of how we have gone about designing, developing, communicating, organizing, storing, accessing, using, and even valuing P&P information. For example, manual and

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New P&P SIG Team Leaders

By Raymond E. Urgo

I am writing to inform you that as of last month, I have accepted the position as P&P SIG Manager. As some of you may know, I am the SIG's founder and first manager. I also headed up the STC SIG Program for two years reporting to two STC Presidents. So I am no stranger to the P&P SIG or other SIGs.

After several years as manager, Audrey Cielinski-Kessler decided it was time to take off the manager's cap. She has done an outstanding job in keeping us in tack and is now assisting the SIG with the transition in leadership.

Kathy Craddock, after several years as our Steps & Specs newsletter editor, has also decided to remove her hat. She has done a wonderful job in keeping our main avenue of communication in existence among members and in making

our newsletter the longest-existing one on the subject of P&P.

Lois Marsh will be the new newsletter editor and she has a team forming to assist.

You will be hearing further about our other SIG leadership positions, such as membership, web, and archiving as the transition occurs. If you are interested in volunteering in any way, please contact me at rurgo@urgoconsulting.com.

Warm regards,
Raymond

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 jhaskins@logic.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 opportunities, STC conference sessions and publications, and communication with other STC SIGs and professional organizations in areas of common interest.

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electric typewriters tend to limit information development to a serialist (beginning to end) approach for writing and reading information. Today's word processing technology allows for both serialist and holist (multi-entries and exits) approaches for writing and reading information, thereby encouraging information to be modular or object oriented in design. Yet despite this breakthrough, many organizations continue to develop and publish P&P information designed primarily for serialist reading. Another example involves the use of certain online systems available on an organization's intranet for communicating policies and procedures. Some of these systems are allowing users to do more than read; they allow users to offer feedback or input about the P&P information. These systems may also allow P&P specialists to receive reports about the usage of the P&P information. As a result, the value of these online systems has already begun creating a new and higher level of credibility for P&P information and for P&P specialists in organizations. Hence, we seem to be experiencing the dawn of a new era for P&P communication.

So where are you now? Where do you want to be? What's next for you, your organization, your client, and P&P documentation? Your ideas, thoughts, and questions are welcomed by the author, the editor, or the P&P SIG listserv (stcppsig-l@lists.stc.org).

View the table that is referenced in this article at the following Web address:

http://www.stcsig.org/pp/PPS_Articles/FourGenerationsTable.pdf

Raymond E. Urgo is the principal of Los Angeles-based Urgo & Associates, consulting to organizations and individuals on effective communication of policies and procedures. He is the founder and first manager of STC's P&P SIG. He can be reached at urgo@urgoconsulting.com.

P&P SIG Business Meeting

The annual business meeting for the Policies & Procedures SIG was held in May during STC's Annual Conference in Dallas. During the meeting, the SIG bade farewell to outgoing SIG Manager Audrey Cielinski-Kessler. In thanking Audrey for her five years of service as SIG Manager and her contribution to the discipline of policies and procedures communication, SIG founder Raymond Urgo presented her with an Amazon.com gift certificate on behalf of the SIG membership. During Audrey's tenure, SIG membership doubled and the SIG became the longest existing group on the discipline. She was instrumental in establishing the SIG's listserv and first Web site. Many thanks to Audrey for her dedicated volunteer service to the SIG and leading it to become a viable group.

STC Announcement: Apex 2003 Award Winners

Congratulations to Russ Bombardieri, Webmaster; Maurice Martin, Editor, Intercom; and George Hayhoe, Editor, Technical Communication, for their achievements in the 15th annual APEX awards program.

APEX is an annual awards program recognizing excellence in publications work by professional communicators. The awards are based on graphic design, editorial content, and the ability to achieve overall communications excellence. This year, with about 5,000 entries, there were 100 GRAND AWARDS (2%) and 1,541 AWARDS OF EXCELLENCE (31%).

Russ Bombardieri earned a GRAND AWARD for www.stc.org. Maurice Martin and George Hayhoe earned AWARDS of EXCELLENCE for Intercom and Technical Communication, respectively.

Congratulations, also, to their support teams and contributors for their role in creating STC's award-winning publications.

For more information about the APEX awards and its sponsor, Communication Concepts, please visit the competition Web site at www.apexawards.com.

Volunteer Needed

We have an opening for a volunteer to assist with the SIG's listserv archiving.

If you are interested in learning more, contact Raymond Urgo at urgo@urgoconsulting.com or 323-957-9317.

A Change in Seasons; A Change in Editors

By Kathy Craddock

I recently attended the wedding rehearsal dinner for a dear friend's son (the groom-to-be is an avid sportsman). As my friend stood to welcome everyone and make the first toast, she quoted something very familiar to me; "To everything there is a season, a time to be born and a time to die; A time to plant and a time to uproot...A time to weep and a time to laugh..." She spoke warmly and lovingly about the couple and then continued by saying "This passage is particularly appropriate for my son's life because for everything there IS a season; duck season, deer season, fishing season..."

As the summer winds down we see signs of the approaching fall and the changes this new season brings; children prepare for a new school year, football teams gear up for autumn's games, new projects kick-off and the days begin to slowly shorten. It is also time for changes in our SIG team leadership, including the newsletter team. I am stepping down as editor and welcome

Lois Marsh into the position. I have enjoyed my time as editor of *Steps & Specs* and am very thankful for the opportunities it has provided me. It has been a valuable learning experience for me and has allowed me the privilege of working with so many members of our SIG.

Please join me in welcoming Lois Marsh as the new editor of *Steps & Specs*. Lois has been a member of STC for six years. Lois lives in Toronto, Canada and is a member of the Toronto chapter of STC. Lois is a P&P editor with a stock brokerage firm named BMO Nesbitt Burns. Lois will be building a newsletter team over the next few months and I am sure will welcome volunteers. I encourage you to consider making a change from your routine and being a part of this award winning team. It is a wonderful chance to get to know your fellow SIG members as well as enrich your writing and editing skills.

Thank you all for your assistance over the last two and a half years and Good Luck Lois!

Kathy Craddock

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 Lois Marsh or Raymond Uργο for more information or to submit your bio or FAQ.

Introduction to Policies & Procedures Communication (online course)

October 9 thru December 4

UCLA Extension

Raymond Uργο, instructor

For further information contact:

310-825-4192

www.uclaextension.org

Want to Talk Back?

Steps & Specs invites your comments on this issue.

E-mail your comments to Lois Marsh at Lois.Marsh@Bmonb.com or Raymond Uργο at rurgo@urgoconsulting.com.

Responses will be published in the next issue of *Steps & Specs*.

Let us hear from you.

Deadline Reminder

The deadline for submission for the fall issue of *Steps & Specs* is September 5.

For more information or to E-mail submissions contact Lois Marsh at Lois.Marsh@Bmonb.com.