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Steps&Specs

The newsletter of the STC Policies and Procedures Special Interest Group

Step Up to the Plate! Call for STC Conference Presenters

By Dawnell Claessen, ***San Antonio, Texas***

It's not too late to sign up as a presenter in Baltimore! And there's a bonus: speaking at the conference allows you to register at a reduced rate.

The 51st Annual STC Conference will be held in Baltimore, Maryland, May 9-12, 2004. Our P&P SIG has proposed three "group" sessions: two panel discussions and one Progression Session. We still have one seat open on each panel, and room for two or even three more tables in the Progression.

Even if you aren't ready to take the plunge and present at the conference, why not volunteer to moderate one or more of these sessions:

Panel Discussion: Life Cycle Management of Policies and Procedures

P&P SIG has proposed a panel of four to six speakers who will each make a short presentation (10 minutes or less) about one or more stages in the life cycle of policies and procedures documentation. Speakers will also respond to questions from the audience and session moderator.

Panel Discussion: Writing Compliance Documentation
P&P SIG has proposed a panel of three to five speakers who will each make a short presentation (10 minutes or less) about the process of developing and managing policies and procedures specifically for compliance. These compliance documents can address administrative policy, corporate policy, legislation, process models, standards, regulation or any other type of governance to which an organization adheres. Speakers will also respond to questions from the audience and session moderator.

Progression Session: Topics in Policies and Procedures
Potential presenters should define ANY topic relevant to policies and procedures and deliver a 15-20 minute presentation to a small group of about 10 persons. Presenters usually deliver the same presentation to three different groups. The atmosphere in a progression session is friendly, relaxed and usually low key. The attendees often ask questions and are active participants in the presentation.

This format is a wonderful way for new speakers to inform their audience about their area of expertise or practice. Best of all, if there are openings, potential speakers can still volunteer to host tables as late as February 2004.

To find out more or volunteer:
Please contact Dawnell Claessen at mail@dawnell.com or (210) 279-1139.

In This Issue

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

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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 Urgo for more information or to submit your bio or FAQ.

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.

Documenting Policies & Procedures: Resolving the Content Versus Appearance Dilemma

By Pastor Cordero, ***Caracas, Venezuela***

You may have come to one of these startling conclusions at the end of a P&P documentation project:

1. OK, everything is written, all relevant details are included...but what a large and boring document!
2. What a great document – it´s friendly, easy to read...even a child could understand it; but something seems to be missing!

This dilemma is faced by every P&P writer at some point. On one hand, we have to produce complete and accurate "How To" instructions that clearly explain how to perform every task. On the other hand, the document has to be attractive enough to catch the user´s attention and easy to understand as well. These criteria are very important: what's the point of a highly detailed document if its appearance is so unappealing that nobody wants to read it?

That´s why it's so important to find a balance between detailed description and a nice looking document. P&P specialists have been searching for this balance for years, and many techniques have been developed. They fall into two basic groups: text-based and diagram-based.

Text-based techniques document actions through prose or structured variants (like playscript, telegraphic style, etc.). Their advantage is that they allow for extensive description that includes every relevant detail in the job sequence. Using a text-based technique, we can easily achieve the objective of completeness. A constraint though, is that the results are sometimes hard to follow because of the volume of detail.

Diagram-based techniques have graphic presentation as their main advantage. In fact, a procedure documented in this way looks like a picture (sometimes it takes just one page). It´s easy to understand and gives you the whole sequence in a single view. That's a pretty good way to fulfil the criteria of being friendly and easy to understand, isn't it? The constraint with diagram-based techniques is that, in many cases, "the picture" doesn´t explain everything on its own, and sometimes relevant details may be omitted.

Have any of these techniques achieved the desired balance between content and appearance? It´s not easy to answer that question in a definitive way, because there are pros and cons to both techniques. As well, finding the right balance depends on the nature of what is being documented. If we're talking about a policy, where the intention is to guide or regulate actions, isn´t text the best way to do this? On the other hand, if it's a procedure where the goal is to show the order of tasks and how to perform each one, is there any better tool than a diagram to represent that?

Another factor in balancing content and appearance in your documents is the audience. It´s important to know who we are writing for. When we know who will read the documents and their profile (academic level, organizational position, etc.), the ability to write with the user's needs in mind is enhanced. When the writer puts the emphasis on communicating just what the user needs to know, deciding the most effective presentation style becomes easier.

Let's draw some conclusions. First, there is no single technique that works for every situation. A combination of them is required in order to document policies and procedures effectively. Second, there are other factors to consider in order to find a balance between content and appearance. The nature of the content and the audience characteristics are two good examples of this.

A final reflection: beyond using the tools and techniques available, the search for balance between content and appearance will continue to challenge the writer´s creativity. It's all part of our evolution as communicators. Want to know more about this topic? Take a look at these references:

Practical Playscript. Barnett, Robert. Canberra, Australia: Robert Barnett & Associates, 1993

Establishing a System of Policies and Procedures. Page, Stephen. Westerville, Ohio: Process Improvement Publishing, 2000. Chapter 4: Writing Format – pages 45 to 58

Telegraphic Style – An Often Unknown, Yet Useful Writing Technique. Urgo, Raymond E.: Steps & Specs, Vol. 6/No. 4/December 2000 – page 5

Pastor Cordero teaches P&P writing at Simon Rodriguez University, in Caracas, Venezuela. He has worked in various roles as Procedures Analyst, Project Manager and P&P Manager for companies and goverment agencies since 1988. Pastor joined the STC in May 2002.

SIG's Leadership Team Kicks Off 2003-04 Year

By Raymond E. Urgo, ***Los Angeles, California***

We are in the first quarter of the STC year, and already our SIG's leadership team is in motion. All leadership positions of the SIG are filled with volunteer members. We recently held our first telephone conference where we introduced ourselves and our goals for the year. Our seven volunteers are represented from three countries spanning four time zones.

As the SIG's manager, my first goal is to fill all leadership positions and develop a team-focused relationship among our volunteers. Going forward, I want to position the SIG in ways that best meet the needs of an evolving global membership and enhance the image of policies and procedures (P&P) as a communications discipline.

Let me introduce the new P&P team:

Dawnell Claessen, from San Antonio, Texas is our Conference Proposal Coordinator. She is responsible for coordinating the P&P SIG-sponsored sessions for inclusion at the STC Annual Conference. Dawnell has diligently submitted proposals on behalf of our SIG for sponsoring one progression and two panel sessions on P&P at the next conference in Baltimore, Maryland. Dawnell is presently seeking additional presenters for these sessions.

Lois Marsh, from Toronto, Canada has stepped on board as our new Steps & Specs newsletter editor. Her goals include issuing a production schedule; changing the newsletter issuing convention from seasons to quarters to reflect our global audience; and evaluating the suitability of the newsletter's name, masthead, and delivery medium to meet the changing needs of our members and appropriately reflect our SIG's mission.

Gem Smith, from Houston, Texas will be assisting as proofreader on the newsletter team again this year.

Candie McKee, from Stillwater, Oklahoma will be assisting again this year as Membership Coordinator. Her goals for the year are to develop a membership card welcoming our new members and to keep us informed of trends in member numbers.

Eddy Frost, from Salem, New Hampshire has joined the team as our Listserv Coordinator. He plans to efficiently administer this valuable means of interpersonal communication for the benefit of the P&P SIG membership.

Janice Haskins, from Hamilton, Bermuda will continue in her role as Webmaster, primarily maintaining the site.

With our volunteer members in place and in motion, the SIG is off to a positive start. As always, we welcome your suggestions and additional volunteers. If you have a suggestion or would like to volunteer in any way, please contact the appropriate volunteer leader or me.

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

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 Urgo 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 winter issue of ***Steps & Specs*** is January 5.

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

Volunteers Needed

We have openings for two volunteers to assist with the SIG's newsletter: ***Assistant Editor*** and ***Layout Specialist*** (desktop publishing).

If you would like to try your hand at either, please contact Lois Marsh at lois.marsh@bmonb.com or 416/ 359-6751 (Eastern Time Zone).