

## Manager's Report:

### SIG Membership Tops 1,000 and Volunteer Positions Are Open

*By Raymond E. Urgo*

As we progress into 2006, our SIG's membership climbed slightly over 1,000 members. The last time we reached that number was around 2000. Our membership declined dramatically along with STC's due to the impact of 9/11 and declines in the high-tech industries at the outset of this decade.

We can attribute our increase to STC's growing membership and changes in STC that encourage greater participation in its communities of professional interest. Also, we have expanded our publicity and remain the world's only known organization of professionals dedicated to P&P communication.

While our membership has increased, we continue to have positions open for volunteers. These involve information and research, and volunteer coordination (brand new). Value in our SIG comes from volunteering. You can learn more about these open positions on our Web site at:

<http://www.stcsig.org/pp/volunteer/index.php>.

Speaking of increased membership and volunteers, the P&P SIG will have a significant presence at the STC Annual Conference in Las Vegas. Our participation in annual conferences usually brings in new members and it offers an opportunity for our members to volunteer as speakers on P&P. Be sure to read elsewhere in this issue about what topics and events on P&P will be addressed. I look forward to meeting many of our fellow SIG members at this year's Conference and I hope you do too!

### 53rd Annual Conference Update: P&P SIG in Las Vegas

*By Dawnell Claessen, Conference Coordinator*

The Policies and Procedures Special Interest Group will have an excellent showing at the STC Annual Conference in Las Vegas May 7-10 2006! The following is a listing of events and sessions that may be of interest to members of our SIG attending the conference.

#### Sunday, May 7

First-time Attendees Session 2:00 – 3:30 pm (Location TBA)

**Speaker's Orientation Session** 3:30 – 4:30 pm (Location TBA). This will be immediately followed by a very brief and informal meeting for SIG Sponsored Speakers in the same room.

**Welcome Reception** 7:30 – 9:30 pm (Location TBA). P&P SIG will have a table somewhere in the thick of things!

## **Monday, May 8**

### **Policies and Procedures Communication 101 – Presentation by SIG Manager Raymond Urgo**

Session Info: WE 3O Monday May 8, 2006 2:00-3:30 pm - Bronze 3 Bally's

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.

### **Leveraging Technical Communication into a Process Improvement Career – Presentation by SIG Member Elizabeth McQueen**

Session Info: PD 4U Monday, May 8, 2006 4:00 – 5:00pm - Palace 3 Bally's.

Corporate process improvement holds terrific career advancement opportunities for technical communicators. Come learn how to leverage your skills to achieve corporate process improvement goals, as well as how to ensure management support for your initiatives. Presenter will share a proven path to success in defining and implementing process improvements.

### **P&P SIG Annual Business Meeting**

Monday May 8, 2006 at 4:00 – 5:00 pm - Association Office #1

## **Tuesday, May 9**

### **Shoes and SOX – Getting a Foothold on Sarbanes-Oxley – Presentation by Mark Hanigan and Bonnie J. Spivey**

Session info: MG 6Q Tuesday, May 9, 2006 11:00 – 12:00 noon Palace 3 Bally's.

This presentation explains the foundations of SOX, analyzes where its implementation is today and where it seems to be heading, and focuses on opportunities for technical communicators.

### **Topics in Policies and Procedures – SIG-Sponsored Progression Session**

Session info: WE 7B. Tuesday May 9, 2006. 2:00 – 3:00 PM Vendome A/B Paris

Fifteen speakers from various areas of practice will host tables with a variety of topics directly relevant to Policies and Procedures practitioners. Attendees hear a twenty minute presentation about one topic, and then move to another table to hear the next twenty minute presentation and so on. Sessions in this format are among the best attended at the conference. For full details, see [PP Topics Progression Session Details](#).

### **SIG Networking Luncheon**

Tickets are \$20 and must be purchased in advance. The P&P SIG will have several tables! 12:15 - 2:00 pm.

## Honors Reception and Banquet

Tickets are \$40 and must be purchased in advance. Come and see our own Raymond Urgo honored by STC and made a "Fellow" of the Society. 6:00 – 9:00pm.

## Wednesday, May 10

### Developing and Managing Policies and Procedures for Compliance – SIG-Sponsored Moderated Panel Discussion

Session info: WE 9N. Wednesday May 10, 2006. 8:30-10:00 AM. Room: Bordeaux, Paris

Five panelists will discuss the challenges and opportunities and some "best practices" relating to policies and procedures developed for compliance.

Be sure to check our website for updates to conference information at [www.stcsig.org/pp/](http://www.stcsig.org/pp/).

*Dawnell Claessen has been successfully coordinating our SIG's participation in the annual STC conference for a number of years. She can be contacted at [mail@dawnell.com](mailto:mail@dawnell.com).*

## The Many Faces of Technical Writing

*By Diana Coombs*

A year ago, a 10-year-old girl asked me what I do. When I told her that I'm a writer, she asked me what I write. It's hard to explain to an adult, let alone a 10 year old! Un-phased, she tried to guess. "Do you write books? Do you write articles? Do you write for TV?" After a short struggle, she asked, "Do you write things that not a lot of people know about?" She finally hit the nail on the head.

Many STC members fall neatly into a recognized category of writers, like financial services or computer software. I'm going to tell you about a different category, whose name is something of a misnomer: "technical writing" for the government.

Why is this a misnomer? Because it is not IT-related. It isn't scientific, and it isn't about writing manuals. There is no good name for what I and my colleagues do. For one thing, we work for a company that holds a contract with the Coast Guard and other agencies. So we're not really government writers. For another, no one ever made up a name for what we do. This is the only part of the country where "technical writer" could mean anything related to what we do.

Our company's home base and headquarters is in Alaska, although I've never been to that office (I have been to Alaska!) We're legally "an Alaska native corporation." The company holds many government contracts, but my job is to work with the Coast Guard. You remember the Coast Guard, right? The heroes of Katrina? Yeah, I work with those guys. I work with engineers who specialize in any field that the Coast Guard specializes in: protection of human life, property, and the environment. So in one project, I'm working on fire extinguishing systems, and in another, the amount of drinking water inspected vessels have on board. By "inspected vessels", I mean what most of us would call "boats" that the Coast Guard inspects (to ensure it

meets Coast Guard safety and environmental standards.) But be warned! If you ever use the word “boat”, it is a technical term to the Coast Guard, describing mostly smaller vessels.

We don't do just one thing in our job. We don't just draft, or just copy-edit. We do everything that involves writing in the regulatory process, from start to finish. We draft a description of the regulatory project so that the Coast Guard Commandant will permit the engineers to carry through the regulatory project, and we edit it at least once. We draft public notices of upcoming rulemakings, and edit them at least once. We also use code language to direct the Federal Register to change rules, and we create whole new rules. We go to meetings; we give style and grammar advice to engineers, and smile at the Coast Guard. Should the Coast Guard ask us to create an Excel table, or mine data, we might do that too. Maybe we have to follow the narrow military protocol when we do any of these things. We just don't know -- but most of the time we're in the Coast Guard headquarters building, in downtown Washington, D.C.

The background of each writer varies, including one with a legal background, another a secretarial background, a recently published writer, and a school teacher. The main prerequisite is demonstrated writing ability.

The main point is: no one is familiar with this unique but large group of writers. We are here for the government and because of the government. Yet even in the Washington DC area, we are unheard of and unseen outside the office. There is not a single professional association designed for us. Even the STC SIG group that most people would refer me to includes people from completely different job descriptions that have no relation to the government!

At my first STC meeting, I was stunned to realize that most writers at the meeting had no idea what my job was. They'd never heard of such a thing. So I'm here to remind you that there are many, many kinds of writers. Some of us fit into neat categories that have been around since the beginning of time. And some of us fit into something different. However, we are all writers, and we share an appreciation for good communication.

*Diana Combs is a Technical Writer II for Sage Systems Technologies that is nationally based in Alaska and regionally based in Manassas. Diana works in the District of Columbia, and lives in Alexandria, Virginia. You can contact her at [DCombs@comdt.uscg.mil](mailto:DCombs@comdt.uscg.mil).*

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## Member Profile – Eddy Frost



**Direction:** Can you briefly describe your business background?

**Eddy:** I'm an IT guy who's more interested in creating solutions for people than technology itself. After getting my Bachelor's degree in Biology in the UK, I started with IBM, moving into the City of London in programming, then systems administration, and finally tech support. As I became more interested in the application of technology, I moved into customer service, sales, and then business consulting. I've worked for what is now Azur Group for 16 years, specializing in document management solutions specific to policies and procedures. Our **Trove™** and **Deployer™** solutions have around half a million end-users worldwide, and we are a Microsoft Gold Partner. As a volunteer in our SIG, I also administer the P&P list-serve and membership.

**Direction:** Tell us about your work – responsibilities, challenges.

**Eddy:** I do two jobs. I spend about a third of my time managing Azur's US operations – a great team of highly talented professionals working throughout the US. It's a tight, busy team and they are a joy to work with. Having said that, I really get my energy from the other two thirds of my time: working with P&P professionals in every sector: healthcare, financial, government, retail and occasionally manufacturing, too. In a typical year, I work with about 40 new companies while managing accounts for 20 major accounts. It's a busy life, and I count on my team a lot. My responsibility is to proactively ensure that each company has the best control and management of their policies and procedures, drawing from Azur's and Microsoft's technology.

There is no one-size-fits-all solution. The challenge is to really come alongside people and understand their world, their challenges. My satisfaction comes from seeing the difference that well-applied technology can make to people's lives.

**Direction:** Tell us about your audience.

**Eddy:** I spend most of my time working with people in hospitals and banks. Both are highly regulated markets where regulations change every week, and liability for non-compliance is a big deal. P&P professionals normally have to deal with this and overwhelming work loads on a tight budget and often with a low profile in their organizations. It's a real challenge for them, and therefore for me. Success is all about achieving control and empowering the Subject Matter Experts so that work loads remain do-able and corporate compliance is achieved.

**Direction:** What do you like most about your job?

**Eddy:** Primarily: people. Technical Communication – especially P&P, is all about people and processes. If you don't like people, then this is probably not the world to be in! Secondly, I love technology that just works; never for its own sake, but when it works for the people and the organization. I think that our world is heavy with technology that is often bewildering and hard to live with. I really enjoy implementing P&P systems that work simply and well.

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

**Eddy:** Be customer-centric in your thinking, always. Join the STC P&P SIG and develop a mentoring relationship with the best people who will have you. Also: think like you own the business.

**Direction:** What's the biggest P&P challenge that you face in your industry or specialty?

**Eddy:** In the technology world, things change all the time, but after 20+ years in the industry I know that there is really nothing very new under the sun. Each wave of technology is about doing the same thing better. The real challenge is to never be driven by the technology, but always by the business need.

**Direction:** Can you tell us a bit of personal information about you?

**Eddy:** My wife Linda and I live in a beautiful New Hampshire log cabin with two Tonkinese cats. Our two sons are in college in Massachusetts. All four of us (not the cats) are applying for U.S. citizenship this year. I love old motorcycles, old guitars and work weekends as a lay pastor for my church. It's a wonderful life!

*Eddy Frost is General Manager, Azur Group Inc., providers of document management solutions to the policies and procedures community in the USA, UK and Ireland. Visit [www.AzurGroupinc.com](http://www.AzurGroupinc.com). To contact Eddy, email him at [EFrost@AzurGroupinc.com](mailto:EFrost@AzurGroupinc.com).*

## Tax Tip for Freelancers: A Personal Savings Plan That Works

*By Geoff Hart, Associate Fellow, Montreal Chapter – Reprinted by permission*

As a parent of two teenage kids, the concept of going freelance originally scared me silly. In particular, I'd never really run a business before and accounting was just one of those things my brain never seemed capable of handling. (It turned out to be easier than I'd feared, fortunately.) One of my biggest worries was how to ensure that come year-end, I'd have enough money left over to cover my tax liabilities.

A little thought provided a solution that works particularly well for me and that keeps me from spending money I don't have. Better still, it creates an enforced savings plan I can live with and that requires minimum overhead on my part. In this article, I'll describe how it works.

### First things first...your operating reserve

But first, a word of caution: It's important to remember that as freelancers, we must always keep a well-stocked reserve of money, often referred to as an "operating reserve" or "emergency fund", that will cover our expenses for at least three months and preferably longer. This sum is what we'll survive on during dry spells when there's no work, or during life crises such as a sudden injury or illness that prevents us from working. The only goal of the reserve is to keep us financially alive until our business revives or our disability insurance kicks

in. If you haven't built up such a reserve, creating one should be a priority. I built mine slowly by forcing myself to put aside money while I was a wage slave so that it would be ready when I made the leap.

My solution was to create a very simple spreadsheet that I use to track my income and expenses. The "income" page contains the following columns:

- **Column 1: Details on the work—often just an invoice number that contains the client's name.**
- **Column 2: The fee charged for the service, excluding relevant taxes.**
- **Columns 3 and 4: Federal and provincial sales taxes. (In the U.S., replace "provincial" with "state".)**
- **Column 5: The total of the previous three columns.**

At the bottom of the spreadsheet, I total each of the numerical columns, thereby providing a constantly updated running total. Below these totals, I have three additional rows, each of which represents one of the three overall Canadian tax brackets. For each row, I calculate my income tax based on the tax rate for the corresponding tax bracket, but here's the trick: I don't include any personal deductions or exemptions in that calculation. The result is that the column totals for sales tax tell me my total sales tax burden, and the row totals for each tax bracket tell my maximum income tax liability. (With a little more sophistication, I could create a single formula that calculates the tax liability, but I was still learning the basics of Excel when I developed this approach.)

## Calculating your tax liability to allow for savings

Each time I add a new paid invoice to the spreadsheet, my maximum tax liability (income plus sales) is updated at the bottom of the sheet. When I deposit each new check at my bank, I pause for a moment to ensure that the current balance in my financial reserve—a special short-term savings account that I'll describe in more detail in a moment—is larger than my total tax liability based on the spreadsheet. If not, I transfer enough of the new check to top up the account and cover my liability. Anything that remains becomes disposable income.

By the end of the year, I not only have enough money to pay my taxes, but I also have an additional sum (usually a large one) that arises from how I chose to calculate my taxes: with no deductions or personal exemptions included, the calculated tax bill will always be higher than my real tax bill. Barring any emergency expenditures that force me to dip into my reserve, I'll always have money left over at year-end. Some years, I even get a tax rebate on top of the enforced savings. In any event, any extra money that isn't required in my short-term reserve goes straight into retirement or other long-term savings.

## And now...how to invest the loot

The "short-term savings" account that I referred to earlier is more than just a regular bank account, because such accounts pay essentially zero interest. In my case, it means a money-market mutual fund that earns a steady, unspectacular rate of return with maximum security because the money is all invested in government bonds and similarly safe investments. The low interest rate is an acceptable trade-off for obtaining high security and near-immediate liquidity: I can extract the money with 1 day's notice, and there's no "load" (purchase or redemption charge) to either buy more units of the fund or redeem existing units when tax time rolls around.

If you have more money available and are willing to lock in your savings for longer periods, "guaranteed investment certificates" (Canada) or a "certificate of deposit" (U.S.) may make more sense because these investments often offer higher rates of return. If you're a gambler, you can invest in riskier but higher-return

investments such as stock funds, but I don't recommend this approach; the sole purpose of this savings account is security and liquidity, not a high rate of return.

Your financial circumstances may dictate a slightly different strategy. For example, if you're living hand to mouth, you may have little money left over to top up your reserve. Conversely, if you're earning far more money than you need to cover your expenses, you can make additional deposits or top up your long-term savings. The key is to have the discipline to sacrifice a little bit of comfort while you're building up your reserve so that you can relax a bit and spend more freely in the future.

*Previously published on the website of the Consulting and Independent Contracting Special Interest Group. Geoff Hart is an Associate Fellow of the STC. He can be reached at [ghart@videotron.ca](mailto:ghart@videotron.ca).*

## Announcements:

### Lois Marsh Honored with SIG Service Award

*By Raymond Urgo, SIG Manager*

At the recommendation of the Policies & Procedures SIG leadership team, the STC Board recently elected to honor Lois E. Marsh with the STC Distinguished SIG Service Award for her contributions to the P&P SIG.

Lois has contributed to the Policies and Procedures SIG and its discipline in a variety of capacities since the early 2000s.

Since 2003, Lois has served the SIG as Editor of our newsletter. She led the way in repositioning the newsletter to appeal to a more global audience. She has accomplished her goals by leading the effort to rename the newsletter after more than ten years from Step and Specs to Direction. She led the transition of the newsletter from portable document format to HTML format with a new banner and logo. As editor, she recruited and managed volunteers to assist on the newsletter team. Lois also recruited members to author articles for the newsletter and has led the publication of each issue consistently in a timely manner.

In addition to being editor, Lois has authored articles for our newsletter. She has been very supportive with feedback and ideas for revamping our Web site.

Lois is a team player in our SIG. She welcomes participation, input, and feedback from other team members, and always demonstrates a cooperative and positive attitude which contributes to her being a pleasant person to work with.

When it comes to volunteer service and the SIG's newsletter, Lois is indeed someone who we have come to count on for quality assistance.

The citation for Lois's award, to be presented during the STC Annual Conference in May, reads: In recognition of your exemplary efforts to revitalize the newsletter of the Policies and Procedures SIG and for your positive and cooperative volunteer spirit to all SIG activities.

For further information about Lois and to congratulate her on her DSSA honor, contact her at [lois.marsh@bmo.com](mailto:lois.marsh@bmo.com).

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## Upcoming Course in Policies and Procedures

### Introduction to Policies & Procedures Communication (Web-based course)

University of California, Los Angeles Extension

Dates: April 13 through June 8, 2006

Fee: \$550. (\$500 for STC members)

Course# 439.19

Reg# R9115

Instructor: Raymond E. Urgo (rurgo@urgoconsulting.com )

Contact: UCLA Extension 310/825-4192 or [www.uclaextension.edu](http://www.uclaextension.edu)

## Call for Volunteers

The P&P SIG seeks volunteers for the following opportunities:

- Volunteer Coordinator
- Information & Research Project Assistants
- Information & Research Manager

For details, see [http://www.stcsig.org/pp/volunteer/open\\_positions.php](http://www.stcsig.org/pp/volunteer/open_positions.php).