Direction

The Newsletter of the STC Policies & Procedures Special Interest Group

4th Quarter 2006

Manager's Report: New Leadership Transition

By Dawnell Claessen

I am honored and pleased to assume the role of SIG Manager for the P&P SIG. Raymond Urgo has left the SIG in an excellent position and the SIG has flourished under his leadership and guidance. I would like to thank him for his countless contributions to this community in the past and his willingness to advise and consult with us as we move forward.

As I transition into this leadership position, I do not do so alone. For the first time in the SIG's history, the P&P SIG Manager has a Co-Manager. Lois Marsh has volunteered to serve as Co-Manager and she and I will share responsibilities. Lois and I have collaborated well in the past and I know we will make a great management team!

Look for Lois's first SIG Manager's Report in Direction next quarter. In the meantime, I would love to hear from my fellow SIG members. Please feel free to email me (mail@dawnell.com) with your comments, concerns or questions!

My Goals for the SIG through June 2007:

- Effect a smooth transition of SIG Management.
- Plan for P&P SIG volunteer conference call in mid- January.
- Develop and Release a new SIG brochure.
- P&P SIG Business Meeting and Reception at Conference in Minneapolis May 2007
- Have GREAT P&P SIG sponsored sessions at Conference in Minneapolis May 2007.

Beyond June 2007:

- Investigate topics and speakers for at least one P&P topic webinar
- Poll SIG members to see if they would prefer to elect their SIG manager
- Working with volunteers, prepare and submit at least two quality proposals for the conference in May 2008.

Volunteers:

The SIG depends upon good volunteers, and I think this community has some of the best volunteers around. But we can always use more volunteers! We need folks to take on a single task such as writing a newsletter article or moderating a topic on the listserv.

Inside this issue:

Want to write for Direction?

Do you have an idea or experience you'd like to share with your fellow members? Or do you know of any new P&P resources you'd like to share? Submit your article or announcement to the editor at:

aedugyan@yahoo.com

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We also need one or two persons take on volunteer positions, and my old position of Conference Proposal Coordinator just happens to be vacant! Over the course of a fiscal year, that position requires about 25 hours. Most of that time is spent in the late summer time. So if you are considering volunteering for any task or position, please plan on joining us on our volunteer conference call in mid-January. We have excellent job descriptions and guidance in place and try to offer our volunteers as much support as we can!

A Word from the Outgoing Editor

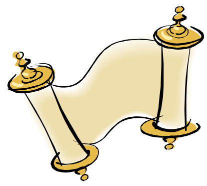
By Lois Marsh

Wow – time flies. I've had a great time serving as editor of the P&P SIG newsletter for the past few years. Thanks are due to Raymond Urgo for giving me the opportunity to serve our fantastic SIG. I had to fill some big boots – the job would have been enormously harder without the coaching and support of the previous editor, Kathy Craddock and Audrey Cielinski, past SIG manager and editor.

I'm excited that Abena Edugyan is moving from Associate Editor to Editor-in-Chief. Abena has done a great job supporting me over the past year, and I will be there for her as she gets comfortable in the role. As you've seen from her member profile last issue, she has quite a bit of experience with newsletters, so it should be a cakewalk, right Abena? Sure…

And I'm excited about my new role as SIG Co-Manager, supporting Dawnell Claessen. With all this movement in your executive, there are a number of volunteer opportunities – want to pitch in? See the vacancies announcements elsewhere in this issue.

My parting message? Your newsletter is only as good as the content we receive. Got a pet peeve about our field, or even better, a solution to it? Sound off… Abena would love to receive articles from you!



Have you joined the Listserv yet?

The P&P SIG listserv (discussion list) is an excellent resource for information and a great way to stimulate discussions among your colleagues—have you signed up yet?

There are two ways to get in on the action:

Online

1. Go to [http://lists.stc.org/cgi-bin/lyris.pl?enter=stc**pp**sig-l](http://lists.stc.org/cgi-bin/lyris.pl?enter=stcppsig-l), the home page for our list. (Note the "pp" indicates our P&P list.)
2. Click the **Join stcppsig-l** button.
3. Complete the form, filling in at minimum your e-mail address, and set the options that define how you want to receive mail from the list.
4. Click the **Save** button.

Via e-mail

Send an e-mail message to owner-stcppsig-l@lists.stc.org, with "SUBSCRIBE stclwrsig-l [your e-mail address]" in the body of the e-mail.

10 Questions to Ask Before Developing Documentation for Business Processes, Policies, and Procedures

By Kathy Stanford-Jones

What do users want from their Policies, Processes, and Procedures? They want information that is: easy to access without endless searching; absolutely correct and up to date; and clear and concise.

Developing documentation is a process, not a task, and therefore requires planning and management. There are a few questions that you should ask before you start to develop your documentation.

1. Do your processes cross departments?

The beginning of any documentation process is to prepare a cross-functional process map. You should understand if processes cross departments (e.g. procure to pay) in order to fully understand the context of your content. Although you may only document part of the process, you will gain an understanding of the scope of a process. Furthermore, you will understand critical inputs, outputs, and control points.

2. Do you know the purpose of the content?

Policies, Processes, and Procedures dictate different types of content and, therefore, have different qualities and components. The purpose of the document is extremely important as it defines the potential audiences, end users, learning and work environment, and level of detail.

3. Do you know who your audience is?

Knowing your audience will determine how documentation is structured and written. There are different formats and styles used based on your audience. One size does not fit all. You must know the audience's needs and wants, and the factors that will contribute to success - and to failure. Documentation must be intuitive for the audience. In addition, part of understanding the audience is knowing how and what they use for search criteria. This understanding highlights inconsistencies between audiences on terminology.

4. Do your content authors know the tools they are using?

Many times authors work within their respective areas of expertise but do not know the tools (i.e. authoring tools, best practices, interview techniques) needed to develop documentation. Having multiple authors is a major reason for inconsistency between documents. You should either train the authors on how to use the tools or hire experts who can develop the documentation better and more efficiently.

5. Do you have predefined templates for the different types of documentation?

Predefined formats not only make it easier for authors to create documentation but also make it easier to convert documentation to a Content Management System (CMS). Predefined formats make content categories consistent so users know the type of information contained in a document, furthering the requirement that documentation be intuitive.

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6. Do you have consistent terms between all documents?

Consistency not only allows for easier access to and use of documents, but allows documents to be categorized and more easily moved to a CMS. Documents that use multiple terms when referring to one 'thing' cause great confusion for users. In addition, using consistent terms is the cornerstone for taxonomy development.

7. Do you set up review and approval individuals and teams?

Different types of content require different people or teams to review and approve it; for example, content requiring statutory controls (i.e. Sarbanes Oxley) has specific requirements, and the proper people will need to review it. Documentation that is not properly reviewed and approved will certainly be missing key information and, therefore, will not fulfill the Policy, Process, or Procedure purpose. Complex subjects and processes benefit by conducting a walk-thru early during the documentation process with those that are directly involved with the subject (i.e. users, authors, and technical). This allows for potential issues to be discussed and possibly resolved.

8. Do you test and verify your documentation?

A major reason documentation is not used is because it is incorrect. Documentation must be tested to verify that what is written is precisely correct. Testing must always be performed with the user in mind. Testing is not editing; it is a walk-thru of each step using the system, screen, report, or performing the task the documentation is addressing. Although this appears to be a time-consuming task, there is no other way to verify that the documentation is 100% correct. The time spent during testing will be quickly recovered with users not wasting their time deciphering incorrect documentation.

9. Do you use version controls for the documentation?

Documentation must be controlled to ensure correct versions are used. If there is no CMS, the documentation must still be controlled for future updates and access. Version control does not necessarily mean that all documentation is located in a central repository, but it does mean those who author documentation must know who controls it. Lack of version control causes authors to recreate documentation, causing redundancy. In addition, valuable knowledge is lost when existing documents cannot be used and referenced.

10. Do you have an implementation, distribution and training plan?

When your documentation has been completed, you must implement it and train users. Users must be trained in order to ensure the process is understood. In the event of revisions, you must be able to distribute and train on the new content. Part of implementation and training is change management, which enables the user to notify you of errors, omissions, and recommendations.

Preparing for Content Management

If your company is not currently using a content management system, it will probably utilize one in the future. Policies, Processes, and Procedures should be properly prepared before incorporating them into a CMS, as the system will not solve problems caused by poorly planned and prepared documentation. Addressing the creation and development of Policies, Processes, and Procedures as a process will advance you closer to documentation that is easy to access, and that is correct, intuitive, clear, and concise for the user.

Kathy Stanford-Jones is president of KCG Consultant Group. KCG Group provides expertise in the research and development of documentation for business processes, policies, procedures and practices. She can be reached at klstanfordjones@kcggroup.com.

Member Profile – Amy Woodfin

Direction: Can you briefly describe your business background?

Amy: I received a Bachelor of Science in Health from Texas A&M University with an emphasis on Community Health Education and have been in healthcare for the past 20 years.

Before moving to Washington State ten years ago, I worked in various positions, including in the detox unit at a local psychiatric hospital and as a paramedic. After moving to NW Washington, I began my career with PeaceHealth as a pathology assistant at St. Joseph Hospital in Bellingham and worked my way up to supervisor. From the pathology department, I migrated to the world of healthcare compliance as the Compliance Coordinator for my region and was chosen as the System Policy Coordinator for PeaceHealth a little over a year ago.

I have always gravitated toward policies and procedures. In every job I have ever had I either rewrote the existing manual or wrote a new one. P&P are the reference manuals and guides that help people do their jobs. My natural inclination is to make those documents as clear as possible, easy to understand, and relevant to the job. Every job has its unique challenges-understanding policies and procedures should NOT be one of them.

I constantly seek to improve my skills and knowledge, and am looking forward to beginning work on a Master's degree in Technical Communications this next year.

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

Amy: I am the System Policy Coordinator for PeaceHealth, a Catholic healthcare system with hospital and laboratory facilities in Oregon, Washington, and Alaska. As such, my main responsibilities are to oversee and facilitate the daily policy process throughout the company and anticipate future needs. That includes everything from writing policy documents (policies, procedures, plans, guidelines, standards of care, and protocols), assisting other writers, managing our centralized policy database, providing training to policy personnel throughout the company, and maintaining the System and Regional Policy Centers on our intranet. I travel around the regions a fair bit and thoroughly enjoy meeting new people and learning about their processes.

I am very fortunate to have a team of talented people in each of our six regions that manage their regional policy process and collaborate with me to continuously improve the overall process throughout the company.

Direction: Tell us about your audience.

Amy: My audience depends on the task. It could be an individual policy writer, a regional department getting ready for an upcoming accreditation survey, a cross-regional counterpart group that is putting their processes to paper for the first time, or any of the 10,000 plus employees of PeaceHealth, associated physicians and clinicians, volunteers, students, patients, visitors, contractors, and other business associates that may be included in the scope of a policy document. It is quite a diverse group.

Direction: What do you like most about your job?

Amy: I love the variety of tasks involved in creating policies and procedures. There is nothing better than taking a process, working with the content experts to determine what actually happens (or needs to happen) to successfully accom-

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plish the process, determining the best approach (policy, procedure, protocol, etc.), putting that in language the end users will understand and find useful, and then making it easily accessible to the people that need it when and how they need it. An incredible diversity of processes keep a hospital running and I get to learn something new every day.

I also really enjoy teaching people how to successfully write policy documents. Most of the time I am working with staff who take on writing policies in addition to everything else they do. Let's face it - not everyone enjoys working with policies and procedures, even when its part of their job. My goal is to demystify the concept of policies and policy writing, and break it down into manageable, practical chunks. I love the "Aha!" moments when a new writer gets it for the first time.

I take personal and professional satisfaction in making order out of chaos, successfully completing projects that were thought too daunting, and expressing my creativity through web page design. All of this is only possible with the unequivocal support of company leadership that makes the success of the policy process a priority.

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

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I take personal and professional satisfaction in making order out of chaos, successfully completing projects that were thought too daunting, and expressing my creativity through web page design. All of this is only possible with the unequivocal support of company leadership that makes the success of the policy process a priority.

Another great thing to do is to contact the policy person in other organizations in your field. Ask them what they do and open a channel of communication. I have found that policy writers are more then willing to share their expertise, knowledge, and documents to help a fellow writer. All you have to do is ask.

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

Amy: There was a time that our regions thought of themselves much more independently than they do now. Each region had its own way of doing things and its own way of writing policies. This isn't unique to healthcare. Due in part to the changing regulatory climate and our constant commitment to our mission and values, we shifted the emphasis from independently functioning parts to a whole with interconnected elements. As a result there have been many struggles in the policy process, particularly when we began standardizing the format and centralizing all policy documents into one database. We have made monumental strides toward a more cohesive and effective policy process. There are literally thousands of policy documents that guide us through how we provide healthcare on a daily basis. We continue to reduce duplication wherever possible and consolidate regional documents into system-wide policies when applicable. Everyone now understands the logic and benefits of a defined and well-run policy process. Now if I can just get the diehards to let go of: "But, we've always done it this way."

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Direction: Tell us a bit of personal information about you – e.g., hobbies, where you live, your family, or other information to help us get to know you.

Amy: I grew up in Central Texas and moved out to Washington State, sight unseen, ten years ago. It might sound corny, but I always knew I belonged here and was just biding my time until I could make the journey. I live in the far northwest corner of the state, just 12 miles south of the Canadian border. The Pacific Northwest is an incredible place of mountains, forests, fields, rivers, and ocean. I fall in love with it all over again every day.

I am actively involved with the local Community Emergency Response Team (CERT), teach emergency preparedness classes in the community, and am an advocate for emergency preparedness for animals. I have an art background (prior to healthcare) and occasionally find time to do a piece for friends. I love to read, work in my yard, and travel for fun when I can.

Amy Woodfin can be reached at AWoodfin@peacehealth.org.

Announcements:

Process vs. Procedure: Same, Different, and Related (Webinar)

Compliance Online

Date: January 23, 2007 10-11:30 AM (PST)

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

Contact, fee, and registration: www.complianceonline.com

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

University of California, Los Angeles Extension

Dates: Apr 5 through May 31, 2007

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

Course# 439.19

Reg# (pending)

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

Call for Volunteers

Direction needs you! Got an hour or two to spare every three months? Join Direction's editorial committee in one of these roles:

Proofreader - Direction

- Read through all articles and announcements to find spelling or grammar errors, inconsistencies in style and format, awkward sentence structures, or other mechanical problems.
- Mark up copy electronically and return it to the Editor for correction.
- Must use Microsoft Word in a Windows environment (for compatibility with Editors).

Associate Editor - Direction

- Assist editor in obtaining articles for each issue of Direction.
- Occasionally back up editor by doing layout and other editorial tasks.
- Must have access to Microsoft Word in a Windows environment and ideally Microsoft Publisher as well.

Announcements, continued...

Call for International Judges

Greetings from the 2006-2007 STC International Art, Pubs, and Online Competitions,

STC is inviting technical communicators to serve as judges in STC's international competitions (technical publications, technical art, or online communication). Judging in the international competitions provides a unique opportunity to share information with peers, network, and get a marvelous view of the best work that our colleagues are producing.

If selected, you will serve on a team of three judges to evaluate entries that have already received distinguished awards at the local/regional level. Your team will judge the entries in one or more categories. The number of entries varies by competition and category. All judging and determination of awards are completed before or on the day of judging.

You may apply as either an on-site or remote judge. There are advantages to both, but because of funding considerations, the number of on-site judges is limited and some applicants for on-site judging may be invited to judge on a remote team. If you are applying to be an on-site judge, please indicate on your application if your employer is willing to fund all or part of your travel and/or accommodations.

On-Site Judges

On-site judges will meet in Arlington, Virginia for judging that begins at 8:30 a.m. on Saturday, March 24, 2007. Rooms will be reserved for **Friday and Saturday, March 23-24, 2007**. Priority as on-site judges may be given to persons who have partial or full corporate travel support.

Off-Site Judges

Off-site judges make the initial and final decision on awards in a telephone conference call. The team selects a mutually agreeable date and time for the call but they must allow time for mailing of the entries, and electronic submission of evaluation forms, awards list, and Best of Show forms to the Society office to be received by **March 20, 2007**.

Qualifications for Judges

All judges must meet **at least two** of the following criteria:

1. Master's degree or higher in technical communication or related field.
2. Senior membership in STC
3. Seven years in technical communication or a related field (STC membership not required).
4. Strong publishing background (five articles or one book).
5. Teaching experience in communication or a related field (five years full-time or seven years adjunct or part-time).

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6. Winner of an STC or other communication competition award.
7. Certification by a communication-related professional organization.

Your judging experience and breadth of activity in STC may also be considered.

How to Apply

Complete the application (available at http://www.stc.org/comp/internationalCompetitions01_forms.asp).

The form must be submitted by **December 1, 2006**. You will be notified of the results of your application by the first week of February.

If you are accepted as a judge, details will be sent to you.

If you have any questions, please contact Karen Baranich, STC Competitions Manager, (803) 217-7299 or kbaranich@scana.com

