Direction

The Newsletter of the STC Policies & Procedures Special Interest Group **2nd Quarter 2009**

Manager's Report—by Dawnell Claessen

Conference Notes

I had the distinct privilege of attending the STC's 56th Annual Conference May 3-6 in Atlanta, Georgia.

Even in these tough times, it was wonderful to be amongst my peers.

Monday morning the SIG held our "face to face" meeting and I was excited by our turnout. P&P SIG had about 15 members in attendance which made for a lively discussion about our working community of practice and our professional environment.

Monday afternoon I attended a great educational session called Ten Tips for Tastier Tasks, A Lighthearted Look at Improving Procedures, by Leah Guren. This presentation was so well done that I approached the speaker about putting together a presentation for all our SIG Members. I'll keep you posted on this effort.

Later on Monday afternoon, I went to the annual STC Business meeting. There seemed to be a lot of good news / bad news talk. The Society is facing a large budget deficit and must act on that, but membership renewals were strong.

By the way, P&P SIG membership stands at about 600, this is down by about 180 members. A lot of folks are losing their jobs, but many are finding new ones or are at least finding contract work.

Still, job confidence and the lack of job security seemed to be on everyone's mind. I certainly know that feeling, being an employee of a large defense contracting firm.

Our SIG Progression Session was on Wednesday morning and it was VERY well attended. Over the course of the two hours, we each did our presentations four times for more than 60 attendees – just on our side of the room. Check out the "conference online link" to view session materials that have been uploaded.

Ralph Robinson and Sharon Burton Recognized

Congratulations to P&P SIG members Ralph Robinson and Sharon Burton. At Tuesday night's Honors Banquet, Ralph was made STC Fellow and Sharon Burton was made Associate Fellow.

Volunteer Recruiting

P&P SIG is actively recruiting volunteers and I want to make this very easy for you. If you don't feel you want to take on a position, just volunteer to take on a task and see how it goes.

For example, we need a Membership Manager, but if you don't want to take that on, maybe you would volunteer to send out a welcome email to new members once a month?

We also need a Co-Manager for the SIG, but if you don't want to take that on, perhaps you'd be interested in managing our proposal for next year's conference?

Or maybe you'd consider writing an article for the newsletter, or moderating a topic on the list serve, doing a book review or writing simple quarterly reports or budgets for the SIG? Come on! Step up, your SIG needs you.

Need a good reason to volunteer? Check out Guy Ball's article in this issue called "Smart Volunteering."

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Framing Questions for Accuracy and a Professional Image

By Andrew Cornell

When working as a Policy and Procedures (P&P) specialist, you create and revise procedures when policies and processes change in an organization. As a professional, you must deliver accurate information to your reader and this requires you to gather accurate information from subject-matter experts (SMEs).

To ensure that your technical documents are grounded in accuracy and that your professional image is perceived favorably by SMEs and managers, start using a structured informative-interview process when you gather information. A structured informative-interview process will establish good rapport with SMEs and build a strong framework for your questions before the interview.

P&P Members Communicate with SMEs

A sample of P&P Special Interest Group (SIG) membership shows that members gather information the same way. The sample, which was taken by conducting telephone and online interviews, shows members communicate with SMEs in a lateral direction through e-mail, face-to-face discussions, phone calls, scheduled meetings, and technical documents. In addition, members who are leaders and consultants in the specialty communicate in an upward direction. They meet with managers and clients and conduct interviews. In either case, P&P SIG members spend time communicating with people who have impact on the technical documents they create.

Experts in our profession suggest that they spend less time writing and editing, and more time gathering accurate information from SMEs. Sometimes they need to schedule an interview with SMEs to gather information within an allotted time. Who they interview, and the quality of the relationship they have with that person, can either impede or promote progress. Here are some negative traits and behaviors that are often seen while interviewing SMEs:

- Low opinion of our profession (i.e., you're not an expert in my field; what can you possibly contribute?)
- Hostile and unhelpful personalities (e.g., withholding key information)
- Weak interpersonal and/or communications skills (e.g., inability to communicate information effectively, whether through shyness and/or poor conceptual or language skills)
- Giving the interview low-priority and inadequate time

Because of these potential impediments, we must equip ourselves with knowledge that will ensure our interview time is productive and non-contentious.

Professionals Establish Good Rapport

As a P&P specialist, you will sometimes know more about a subject than the SME thinks, or encounter a SME with awkward interpersonal skills. Avoid the urge to take control of the interview or demand direct answers. He or she may view you as an adversary interrogating them for information, like a criminal investigator. If you see a problem developing, turn the interview into a problem-solving discussion, where you value the SME's help in solving an issue. You will avoid a scenario where the SME becomes defensive.

You should schedule an allotted time with the SME to show good time management skills. Experts recommend at least one hour for face-to-face interviews and 45 minutes or less for phone interviews. Although you will not meet face-to-face with an SME in a phone interview, strive to establish a basic rapport by introducing yourself and explaining the reason for the call.

As technical communicators, we should take our cue from journalists and take the indirect approach to interviewing. Begin with comfortably answered 'closed-ended' questions such as, "Is this procedure done daily?", then continue with open-ended questions such as "Can you explain why do do it that way?" and remember to listen actively and with genuine curiosity. You should avoid being seen as an interrogator and refrain from direct, interrogation-style approach. Reserve the direct, interrogation-style approach for surveys and other lines of questioning.

Professionals Frame the Questions

By building a strong framework for your queries before an interview, you ensure that you will record accurate information in the allotted time. The framework will force you to develop a basic understanding of the subject before meeting with the SME. You might be surprised by how much you already know. You may only need to confirm specific information by asking short, closed-ended questions via e-mail or a phone call.

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By reducing the number of questions the SME has to answer, you appear prepared and sensible, and the SME's perception of you as a peer will improve. In addition, the accuracy of your information will contribute to a reliable technical document.

Designing the Framework

To build your framework, you will design an interview guide and interview schedule on a single page. The interview guide is a rhetorical outline of the interview and lists the main topics. The interview schedule is a list of related questions. To design the guide, know your audience and the purpose for the interview. Create headings for the main topics that need answers. To design the schedule, use the topic headings to create a list of questions underneath. Arrange the questions in the sequence you plan to ask them in the interview. For example, the interview guide might lists three topic headings I, II, and III with nested sub-topics a, b, and c. The interview schedule will show the topic headings I, II, III, a, b, and c with a list of questions underneath. By using one page for the interview guide and schedule, you will be able to glance at it easily and move the interview along.

Develop the Questions

Developing questions and arranging them in a logical sequence for an interview takes practice. When we interview a SME, we are looking for information only. We are not trying to solve a problem or tell him or her what to do. In your interview schedule, arrange the questions in a funnel sequence by asking an open-ended (indirect) question and then work your way down to more specific questions.

It's recommended that you use no more than 20 words for a question, because longer questions become unclear when read. Use direct questions (e.g., "You do this daily, right?") to confirm your understanding or or closed-ended questions to ask for specific information about the topic (e.g, "Are there any rules you need to observe when doing this task?").

Review the Framework

After you have built your framework, try to answer the questions. This way you can see which topics need to be confirmed and what questions can be answered by gathering information without the need for an interview. Don't be afraid to rearrange the interview schedule and modify questions and topics.

Andrew Cornell is a Masters of Arts graduate student in the Technical Communications program at Boise State University. He is a new STC and SIG member. You can reach him at andrewcornell@cableone.net

Information for this article was obtained from the following references:

- *Flammia, Madelyn. "The Challenge of Getting Technical Experts to Talk: Why Interviewing Skills are Crucial to the Technical Communication Curriculum." IEEE Transactions On Professional Communication 26.3 (1993): 124-129.*
- *Kelly, Joseph, and Randy Stebbins. "PCB Regulations and Procedures for Risk Management Including PCB Clean-Up Policy and Procedures." IEEE Transactions On Industrial Applications 29.4 (1993): 708-715.*
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Smart Volunteering

By Guy Ball, OCSTC Senior Member (Reprinted by Permission)

What if I told you that you could learn new skills on someone else's dime, try out new ideas with a "client" who is just appreciative that you're helping, and maybe even network yourself into a new job or a new direction in the process?

I won't use the "dirty 'V' word" to taint this conversation. Let's just call it helping out, paying it forward, maybe even good karma. Works for me. I've been loaning my technical writing skills for free to a few nonprofit organizations over the last couple of years and, besides helping them with needed skills, I've received more benefits than I ever expected. I've learned how to adapt to new situations better, "do more with less," and to think like a guerilla fighter in the war on providing maximum content on a minimum budget.

And I'm not alone. Look a little closer at our OCSTC organization and you'll see people who maintain dynamic web sites, produce award-winning newsletters, coordinate educational programs, and organize some pretty great events—all on their own time and with no expectation of financial return.

But let's talk about sharing communication skills that are, at times, in short supply in the outside world. How many nonprofit groups could benefit from a few hours of your help in rewriting mission statements, program brochures, or event instruction materials for their staff?

Do you want to grow your skill set or offer yourself some variation from the same types of material you do day in/day out? How about creating a newsletter for your local community foundation or an informative web site for a new cancer patient support group? Are you interested in history or science? Small museums are always in need of informative little brochures to help their visitors. They don't need to be fancy; just well written.

How about doing something that impacts not just one or two, but hundreds or thousands of people?

A few years ago, tech writer Sam Poppas was simply helping out when the teacher at his son's school asked him to speak at career day. Sam puts in his 40-plus hours a week and was content coming home and just dealing with family stuff, but he liked the idea of sharing his career with students. After his presentation, the principal asked if he could help out by writing a brief summary of a program the school was trying to get a grant for. Sam saw how disorganized they were and eventually took over the whole grant application, and the school won the funds. Sam commented that the feeling of elation over the success was unlike anything he's felt at work for a long time. And without Sam's help, they probably would not have gotten the grant.

"Writers have a unique and valuable talent that can advance the missions of local nonprofits. Your service is needed now more than ever to help address critical community issues," noted Dan McQuaid, CEO and president of Volunteer Center Orange County, the county's leading group connecting skilled volunteers with organizations that need assistance. "Volunteer Center can connect you to make a meaningful contribution that utilizes and expands your skills."

What sort of projects might you be able to do? I've mentioned a few. Others I've personally helped with include editing, formatting, and publishing minibooks for a local historical society, collaborating with graphic designers on a downtown walking tour guide, developing a video-based oral history program, and, my favorite, writing a book on local history for a mainstream publisher.

Did I get paid for any of this? Outside of the miniscule book royalty, nope. Nada. Nothing. Did I learn new tools, have amazing control over projects, and feel like I impacted a whole bunch of people? You bet!

Sam said it well. "I picked up new skills that I was able to bring to my work environment and it's made me a bit more valuable. And should something unfortunate happen to my job, I can move into grant writing to bring in some extra income." (He's already written a few more.)

Let's talk about the caveats, though. If you've volunteered for anything, you know there are too few people doing it and you will be called on for other unplanned roles. This is a great way to get burnt out on a relationship with a particular group as your workload increases. Try very hard to limit the extra work you find yourself taking on to the tasks you really want to do. Try to suggest better ways to do existing things so that you're creating a value (and interest) to your work—not just filling in a gap. This philosophy has kept me interested in continuing what I do (15 years with one group alone!).

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Try hard not to impact your family time or the open time that's very important for you. I tend to do a lot of my work late at night once my family has gone to bed. Learn about the group and their operation before you overwhelm them with your great new ideas. Often, an organization operates a certain way because of deeper reason—or personalities. Your new idea might be wonderful, but it could also hurt them as everyone scrambles to accommodate something you're trying to change. (On the other hand, you could also be that breath of fresh air they've needed for years!)

Don't start a project you can't finish. I've helped out several groups with web sites that the previous volunteer never completed. The group was left hanging to dry when the well-meaning webmaster got busy with something in their life. Don't enter into a project if you can't finish or gracefully complete it in a short time. (Remember, these people will talk—and they will either relate how you "walk on water" or left a big mess that no one could fix.)

Lastly, and possibly just as important. Remember some day you will not be there to help. For recurring projects, try to make your work as simple to follow as possible. Try not to work in complex tools if you can. I've created newsletters in Word and web sites in FrontPage – all because I knew that whoever was going to take it on would not be using In-Design or Dreamweaver. I purposely designed things that can be easily updated by a novice. (I made sure they had lots of copy/paste solutions.)

At the start of this article I spoke of the new skills you would learn, the new ideas you could bring to an appreciative client, and the new career direction you might stumble upon. The more you do, the more you will gain back. It's worked for so many of us willing to give it a try. It's really not rocket science. It's smartly using your talents to help others.

Payback? Well, how about smiling faces, a very grateful organization, a successful event or project where you had serious input, and a wonderful feeling deep in your gut. All without worrying about how it was going to look on your yearly review?

And maybe, just maybe, a payback of a better, smarter you as you head off into the crazy job market.

Guy Ball is a senior technical writer for EADS North America Test and Services in Irvine, California. He's volunteered his technical writing skills for over 20 years and swears it gave him skills that let him grow his career and discover new opportunities.

He's written a couple of books, created a few organizational websites, developed an award-winning history coloring book for kids, and honed his professional skills helping on a wide variety of projects. Guy's email address is guyball@pacbell.net and his website is guyball.com.

Want to follow Guy's lead and volunteer with the Policies & Procedures SIG? Contact SIG Manager Dawnell Claessen at mail@dawnell.com.

New Member Profile: Robert Coon

Direction: Tell us a bit about your background and career development, Robert.

Robert: I spent the last 12 years in the journalism field, learning everything from reporting and editing, to photography and page design. I am currently a member of a small but dedicated team that copy edits and designs eight community news sections per week.

This is an important transitional period in my career. With the newspaper industry struggling, I decided last year to pursue technical writing because I already possess many of the traits desirable in the field: I enjoy the challenge of digesting raw information and then rendering it understandable to others; I am detail-oriented; and I am a sociable, curious person ready to engage an expert in any subject.

I studied technical writing through online classes, and have applied my newfound skills in various documents for critiquing purposes. Now I am seeking full-time, contract, even pro bono work for experience. I also plan to launch a web site for a side business in editing and writing very soon.

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

Robert In journalism, your number one goal should be accuracy. However, as speed and competition have combined with changing interests and a wave of "downsizing" newspapers, it has become more difficult to define – much less protect and ensure – this principle.

It is also amazing to me how a group of professionals whose job it is to communicate clearly, often fail to do just that, either with the public or among peers. This is the daily tendency that technical writers face as well, and one that I remain committed to resisting.

Direction: Tell us about your audience.

Robert: Diversity is what drives most decisions concerning what stories to develop and how they will be presented in a newspaper or other media source. What appeals to the largest number of readers/viewers, what speaks to a specific segment of the population, or what reveals a lack of diversity in a particular group or entity, are examples of the thought processes involved. In technical writing, there are fewer options, as the subject drives the communication. Respect for equity and balance, however, remains a critical component.

Direction: Are there similarities between your previous work and a career in technical communication?

Robert: As I mentioned, there are already qualities in (good) journalism that I find attractive in technical writing. I have had to decipher difficult subjects to write clear explanations; to meticulously edit rambling text; and to conduct interviews with sources from all walks of life. Technical writing may differ from journalism in many ways, but the challenge of gathering information and presenting it clearly is similar.

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.

Robert: I am a 39-year-old resident of Tampa, Florida. I live with my wife of three years, Melanie, and my 5-month-old daughter, Shelby. I welcome any reviews of my documentation or any opportunities to exercise my skills. I can be contacted at rcoono3@msn.com.

Editor's Note: *Robert is new to the field of technical communication and looking for his first work opportunity in the field.*

He volunteered many hours on this issue of Direction and has already proven to be a great asset to our publication.

Member Profile: Sarah Wills

Direction: Tell us a bit about your background and career development, Sarah.

Sarah: After graduate school, I spent a few years creating user documentation in the computer software and engineering fields.

However, I began my current position (in which I wear many hats as the Quality / Client Review Manager) writing policies and procedures for a construction company in January 2007.

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

Sarah: I am responsible for overseeing my company's Quality Initiative. The two main components of this initiative are Global Documentation Management (of our policies and procedures) and the Client Review program, where we interview our clients worldwide for feedback.

Direction: Tell us about your audience.

Sarah: My audience varies. It could be members of our parent company or our site managers in the field. I am responsible for anything from one-page policies to my company's overall operating plan.

Direction: What do you like most about your job?

Sarah: I like the diversity of my position. One day I might focus completely on a new policy or procedure and the next I am creating client feedback reports.

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

Sarah: I am not sure if I can give proper advice here. I did not set out to be in this field. I guess the best advice would be to keep an open mind. The field of technical communication offers many different opportunities.

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

Sarah: I'd have to say it's audience acceptance, I work in the construction field and people were used to doing things a certain way for many years.

Gaining acceptance of and generating enthusiasm for our company's new policies has been difficult, but it gets better every day! Acceptance has been supported by the publication of our Quality Initiative and subsequent Global Documentation Management practice. These iwere originally emailed out to the entire company, and now reside on my Quality page on our intranet site (created via SharePoint).

I also continually offer to assist people whenever possible–sometimes going beyond my "technical writer" job responsibilities, and have heard management stress the importance in global conference calls several times.

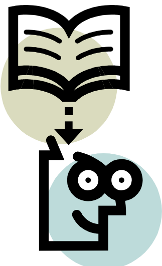
Sarah Wills is the Quality / Client Review Manager with AMECO, a company specializing in integrated mobile equipment and tool solutions providing services to construction, mining, government and industrial markets around the world.

Sarah lives in South Carolina with her husband and three beagles. In her free times she enjoys hiking, listening to live music, cheering on the UNC Tarheels, and cooking.

Sarah can be contacted at Sarah.Wills@ameco.com.

Book Review: People Skills for Policy Analysts by Michael Mintrom

Book review by Catherine Reynolds



Michael Mintrom's book, People Skills for Policy Analysts, offers guidance for both beginners and more experienced policy analysts and writers. To Mintrom, people skills include effectively managing one's own personal activities and behaviors as well as interacting with others. He believes these skills make the analyst more influential in the policymaking process and strengthen the democratic basis of society. His sincerity and straightforward approach convinced me this is a book worth sharing.

Intended for graduate students and professionals, it can be read straight through or used as a reference. Chapters like "Interviewing Informants" and "Writing for Multiple Audiences" offer information that can be used by a variety of technical communicators. He makes the point that inquiries from policy analysts and writers differ from those of journalists or other professionals because of the "ability to analyze information in ways that generate new insights into the nature of policy problems and the alternative ways that those problems might be addressed." The participation of the policy analyst or technical writer who delves into the nature of a product or policy can actually advance its development.

I recently re-read his chapter on "Giving Presentations" before working on one for the May STC Summit. He makes useful suggestions for structuring material as well as offers self-confidence building tips. Like the majority of his chapters, this one ended with a summary, a helpful skill-building checklist, discussion ideas, and a list of sources for further reading.

Do you find yourself in too many meetings that are, well, dreadful? Mintrom's recommendations for "Facilitating Meetings" will help you devise a plan that ensures your meeting involves a lot of participation, generates decisions, and makes people feel energized.

A highlight for me was the chapter "Managing Resources." It advises on career management from the earliest stages and discusses playing to one's strengths and valuing one's time. I also found the "Conflict Management" chapter useful and modified his Conflict Analysis Matrix for a discussion with my co-workers who teach conflict resolution.

Mintrom's writing style can be academic, perhaps because he is an Associate Professor at the University of Auckland, New Zealand, and often counsels students who need life preparation advice. On the other hand, his comprehensive coverage of topics makes up for the slightly paternalistic tone. He understands the need to attend to the smallest of details in both managing one's career and producing excellent work. One curious choice, however, is the cover: a black and white, decades-old photo of five young men in narrow ties and grey suits sit in an office with all eyes on a senior colleague. Perhaps it is just meant to be campy, rather than gender-biased.

Mintrom's realistic career advice should prove motivating to many, especially at this time. The "Professional Networking" chapter contains ways to identify appropriate venues for engaging in social networks. And his final chapter, "Pursuing Excellence," reminds us of our primary goal which is to create what others value.

To do that, we must be prepared to keep learning and invest for the long game in this occupation that may "never be flashy" but can "yield rich professional and personal rewards."

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Book selections must be approved by the SIG Co-Managers based on applicability for our readers and to some extent, price. The book must also be available for purchase by other members (i.e., still in print).

Email your proposal to lois.marsh@bmo.com including the title, author, price, and ISBN number.