

Manager's Report—by Dawnell Claessen



It has certainly been an interesting year! Just like the rest of the world, STC has been impacted by the economic situation.

And just like leadership the world over, our STC leadership got together, made a plan and took some decisive action.

Now our professional organization has a "new normal" and we will carry on; forever altered but hopefully better for all our lessons learned.

I think as long as we strive to fulfill our mission and serve our members to the best of our abilities, we may be altered, but we will survive and continue. And I think that is what really matters.

When Renewing — Choose our SIG

Please take a few moments to read the news about dues and membership renewals on the STC website.

Membership will no longer automatically include communities in the Basic membership — you will have to add the individual SIGs as one of the "Other" benefits of membership. I certainly hope you choose to add the P&P SIG. I think \$10 is a small price to pay for participation in our community.

Conference Proposal Accepted

I am pleased to announce that our proposal to the 2010 STC Conference Committee was accepted and we will have a progression session in Dallas next May.

I hope you will join us for what promises to be a great conference.

\$100 Scholarships for Conference

Do you plan to attend the conference in Dallas May 2010? One or two conference activities volunteers are needed.

Your SIG needs your help and there are various ways you can help while networking and enjoying all the conference has to offer.

I am offering two \$100 conference scholarships to volunteers who will share tasks with me at conference. If you are interested, please email me and we'll discuss the details and responsibilities

Volunteer Openings Available

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

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

The SIG still needs a **Co-Manager**, as Lois Marsh decided to step down a while back. But if you don't want to take that role on, perhaps you'd be interested in managing our proposal for next year's conference? Or writing an article for the newsletter, or moderating a topic on the listserv. Or doing a book review, or writing simple quarterly reports or budgets for the SIG. There are lots of possibilities!

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I have again budgeted for volunteer recognition this year, so the SIG will buy your book for review, or your lunch at conference, or some other form of thanks for your efforts.

In the meantime, I'd like to wish everyone happy holidays and a bright New Year!



Get the Lead Out and Take the Lead — Developing P&P for Green Policy and RoHS Compliance

By Andrew Cornell

Policy and Procedure writers have opportunities to participate in the new economy by developing Green policies. Get the lead out and put on your Green writing hat! Help your organization and its customers work toward a cleaner sustainable environment.

We already follow a number of sustainable policies in our daily lives. Because of hazardous substances, we can no longer just dump second-hand TVs in the local landfill. We dispose of electronic/electrical items at local recycling centers to comply with local policies. These policies have their origins in California state policy and the European directive, WEEE (Waste Electronic Electrical Equipment).

RoHS is the next wave — it's an environmental directive from Europe that stands for "Restriction of Hazardous Substances". So far, electronic/electrical OCMs (original component manufacturers), their distributors, and OEMs (original equipment manufacturers) have policies and procedures (P&Ps) in place to take action on what scientists and researchers have been warning against — hazardous materials like lead (Pb) that affect our health and safety.

How More Companies Can Comply with RoHS

To comply with RoHS, companies need to establish Green P&Ps and audit programs. If you write P&P for a company that ships and receives electronic/electrical equipment, consider establishing a Green policy. Companies implement Green policies by designing an Environmental Management System (EMS). An example of an EMS is the ISO14001 standard. Under the umbrella of an EMS, companies will create P&Ps to audit suppliers for RoHS compliance, and evaluate electronic/electrical equipment.

China In the Lead

Although Europe requires RoHS compliance, China is one of the leaders in promoting sustainability. To enter the Chinese market, product manufacturers must comply with the Chinese RoHS directive and mark their products. For example, ASUSTek Computers mark notebook power supplies with the EFUP (Environmental Friendly Use Period) logo. A logo that visually states the number of years before proper disposal is required. See Figure 1.

Although the Chinese RoHS directive requires specific labeling, companies have the flexibility to create their own labels

for the European market so long as they deliver their products with a "certificate of compliance." This means P&P writers must be aware of labeling requirements and "certificates of compliance" that show products comply with the directive. For markets in the United States, there are no federal labeling requirements, but state legislatures decide if the RoHS directive will be followed.



Figure 1—Chinese RoHS compliant logos: 10 year Environmentally Friendly User Period (EFUP) and Electronic Information Products (EIP)

Getting Started in Your Company

If you are starting a Green policy for your company, consult your EHS and Engineering departments to ensure they understand the RoHS directive and the challenges that may include the following:

- The biggest challenge for OCMs and OEMs who manufacture electronics and electrical equipment is obtaining the same reliability standards involving new materials and processes (e.g., no-lead)^{1,2} to comply with the RoHS directive. New materials and part numbers must be tracked to control the production and delivery of components and equipment designed for different environmental conditions. For example, equipment exposed to extreme environmental conditions (military) require materials that can withstand high temperatures and vibration. This is in contrast to a "Green" laptop computer designed for a typical consumer's lifestyle.
- For large manufacturers involved in the global supply chain, collecting and managing data (part numbers and materials) becomes complicated and requires sophisticated IT systems, e.g., XML and Smart Guides³.

Developing P&Ps for Green Policy and RoHS Compliance – Continued from Page 2

- For small and mid-size manufacturers, the issue of “due-diligence” to comply with the RoHS directive while maintaining reliability becomes more important to compete in the global supply chain. Remember the Challenger tragedy⁴.
- According to MTS Systems⁵ Product Safety and Compliance Engineer, Cedric D’Souza, “We depend a lot on (our global supply chain) designing reliability into their electronic circuit boards and cannot say with certainty if non-lead solder can lower reliability as I do not have the data to back it up.”

Examples of Green Policies

Green policies span across various industries, from companies involved with computers and communication networks to companies involved with medical devices. If you want to develop a Green policy of sustainability, navigate to the following sites for examples from various industries: ASUS computers www.asus.com; Oclaro www.oclaro.com; and IDEX Health and Science www.idex-hs.com. These companies have policies and procedures in place to meet the RoHS directive.

Not only does the RoHS directive help the environment, the directive forces manufacturers to protect their workers from harmful exposure to lead during production. Although the directive is considered a “living document,” and is amended for specific items, you can establish a Green policy and write procedures to eliminate the use of materials that include harmful substances like lead (Pb), cadmium (Cd), and polybrominated materials.

Get the Lead Out – Yes, You!

So get the lead out as a P&P writer and promote Green policy, and go in with your guns loaded. This is a chance to promote your value to the company by transferring knowledge based on SME research and members who participate in the STC SIGs.

And what about that second-hand TV dumped in the landfill? It contains lead to shield you from radiation.

Below are informative links about the RoHS and WEEE Directives and links to health and safety involving lead:

Links to information about health and safety involving lead

www.osha.gov/SLTC/lead/recognition.html

www.ceh.org/index.php

Links to organizations complying with RoHS

www.arrow.com/green/compliance_info.htm

www.oclaro.com/compliance_RoHS_europe.php

green.asus.com/english/

www.idex-hs.com/about/environmental_policy.aspx

Links to RoHS environmental regulation and legislation

www.eiatrack.org

www.rohs.gov.uk

www.RoHSwell.com

en.wikipedia.org/wiki/RoHS_Directive

Journal Articles

¹ Hontao, Ma, Jeffrey C. Suhling, Yifei Zhang, Pradeep Lall, Michael J. Bozack. “The Influence of Elevated Temperature Aging of Lead Free Solder Joints.” 2007 Electronic Components and Technology Conference IEEE, 2007. 653 - 658.

² Sosiati, H., and Kuwano N., Hata S., Iwane Y., Morizono Y., Ohno Y. “Tin Whisker Formation on a Lead-free Solder Alloy Studied by Transmission Electron Microscopy.” 2006 Electronics Packaging Technology Conference IEEE, 2006. 398 - 403.

³ Zhou, Chuanhong, Liu Zhixue and Liang Gao. “Declaration of RoHS Compliance based on Smart Document and XML Database.” 2009 The Ninth International Conference on Electronic Measurement & Instruments ICEMI, 2009 4-1063 - 4-1068.

⁴ Cook, Kendra L. B. “Making Ethical Engineering Management Decisions in a Competitive Environment.” 2007 IEEE, 2007. 1 - 10.

⁵ MTS Systems provide testing equipment and services to a variety of industries that include Ground Vehicles, Aerospace, Civil Engineering, BioMedical, Material Testing, and Sensors.

Andrew Cornell is pursuing a graduate degree in Technical Communication at Boise State University. Andrew's domain knowledge is electrical/electronic systems. As part of his education in technical communication at BSU, he learned about environmental issues and methods involved with print production. He is a member of STC and the SIG, Policy and Procedures. Contact him at andrewcornell@cableone.net

Book Review: Writing Exceptional Policies and Procedures—Stephen Page

by Raymond E. Urgo



Stephen Page's *Writing Exceptional Policies and Procedures*, available as a portable document format (PDF) file, is very similar in subject coverage and writing style to his four published books in print on policies and procedures (P&P). Compared to books by other authors on the subject, this book has the most comprehensive coverage about issues concerning P&P in organizations and the application of allied disciplines that support developing and implementing P&P in organizations.

The book's scope far exceeds the content promised by its title. Most of the book is not about "writing P&P." It is about the role, development, and implementation of P&P in organizations—in concept and in practice, including writing. In addition to writing (verbiage, grammar, format, and style), Page addresses such subjects as researching for topic coverage, building team consensus for effective practices, designing and managing forms associated with P&P, distributing and maintaining P&P documents, implementing P&P through a communications plan and training, and improving and measuring P&P for effectiveness.

As for "writing" P&P, this book is most useful for those seeking to write P&P content in documents according to a traditional and commonly used approach having its roots in the mid-20th century. I refer to this as an extrinsic approach, whereby the writer provides content in each document with pre-established, standard sections having generic headings (such as Purpose, Scope, Responsibilities, Procedure, and more) and with a numerical outline (1.0, 2.0, 2.1, 2.2, and so on). This combination of format and style resembles a legal document, such as an apartment lease, where the document's content is designed for reading sequentially and for remaining unchanged. In contrast, P&P writers

using an intrinsic approach design and develop content as objects in topics (not necessarily documents) and sub-topics based on users' needs, not a standard structure. This approach uses generic and non-generic subtopic headings without a numerical outline. This format and style meet the late 20th-century's needs for maximizing the use of online communication, as with hypertext, and enabling the content to be reused, easily changed, and read non-sequentially.

Page writes in a conversational style and tells his experiences with the application of a variety of disciplines allied to P&P. A stronger edit would make the subject coverage less redundant and more concise in parts of the book. Given the diverse subject coverage in 346 pages, a glossary and an index would contribute to the book's value and usefulness.

In short, this book is ideal for those preferring a PDF file with subject coverage primarily derived from the author's four printed books plus new information. It is also ideal for learning issues and applying techniques from other disciplines to better develop, manage, and implement P&P content and organizational practices. Lastly, this book is ideal for those seeking to apply traditional styles and formats for writing P&P documents.

Raymond E. Urgo is an internationally recognized expert, educator, author, and leader in policies and procedures communication. His firm, Urgo & Associates, provides consulting services on the development and management of policies and procedures systems and information in organizations, and it publishes the award-winning e-newsletter The Policies & Procedures Authority. Copyright 2009, Raymond E. Urgo

Urgo & Associates www.urgoconsulting.com.

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More Book Reviews Wanted — And We'll Pay for the Book!

Is there a book about technical communication you'd like to own? The P&P SIG will pay for your copy if you qualify for our book review program. How does it work? Up to four times a year, the editors of *Direction* will refund the cost of a qualified book on receipt of a book review and a purchase receipt.

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.



Member Profile: Audrey Bezner

Direction: Can you briefly describe your business background, Audrey?

Audrey: My professional career started in 1983 working with Rockwell International. I've worked in defense, banking, health services and software industries, and currently the automotive industry. My positions involved writing from either a technical, sales or organizational (policies, procedures, process manuals, etc.) aspect. Rockwell and Boeing were both highly regulated so all documentation had to meet specific standards such as ISO 9001, military standards or engineering standards.

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

Audrey: I work at Nissan North America headquarters in Franklin, Tennessee. While Nissan is still regulated, my focus is on corporate governance/corporate policies spanning the Americas (Canada, US, Mexico, Brazil, etc.). We collaborate with our global headquarters, other Nissan regional headquarters and locations throughout the Americas. There is a lot of cultural diversity, which makes it challenging and fun. In my current position, I manage the corporate policies for the Americas, as well as the intranet for the region.

Direction: What drew you to the field of P&P?

Audrey: At one company, our department procedures were in bad shape. We nearly failed an audit, so I worked with our manager to update them. It was a blast! At the time, I was a property analyst. So a couple of years later when a position opened up in Procedures Administration, I applied for the job and got it.

Direction: What do you like most about your job (past and/or present)?

Audrey: I really enjoy working with folks to help them improve their policies. Historically, policies can be very complex and include lots of legal terms and redundancy. When a policy transforms from a complex, confusing long document into a clear and concise document, the policy contact transforms, as well! It's great to see how the attitude and ownership becomes more positive. During the review process, many folks provide changes, questions and feedback and I think that's when our policy contacts realize just how important their role truly is and as a result it greatly improves their sense of ownership.

Direction: What advice do you have for someone who wants to get into P&P documentation?

Audrey: I recommend starting by asking your manager if you can become the subject matter expert for your department's documentation. Then learn how policies and procedures are managed at your company and update your documentation through a process improvement team so your department's documents can be a model for others. This builds your credibility and gives you experience that will help you become more involved and possibly transition into a full-time role. If your company offers any courses on writing, editing, coaching, teams, etc. – take them all! There are also plenty of resources online you can read to help you build your knowledge.

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

Audrey: Ensuring organizations understand the value of accurate documentation and how such documentation can be used effectively to monitor and improve organizational processes and practices. At some companies, if there is no monetary gain of doing something, there is no need to do it. So the challenge is to prove that accurate information leads to improvement. Taking the time to make content accurate is essential to better processes that save a company time and money.

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.

I live in Brentwood, Tennessee and have two teenagers and one cat. Since I'm a single mom, my time is typically spent getting my kids where they need or want to be and doing fun things that help make them happy well-balanced kids. I like to read, write poetry, go to museums, shop at flea markets/yard sales and collect minerals (big beautiful rocks!). I also like to redecorate and love databases (one of my weird quirks). I recently swapped my master bedroom with my son because he loves to play his guitars and the equipment takes up so much space. After we made the switch, he wanted to switch back because I made my new little room look fabulous!

Audrey Bezner is Policy Analyst, Corporate Governance at Nissan North America Inc. She will be speaking in our Progression Session at the STC conference in Dallas next spring. Audrey can be contacted at Audrey.Bezner@Nissan-Usa.com.

ANNOUNCEMENTS

STC Philadelphia Metro Chapter Annual Conference: Call for Proposals

Share your knowledge and your experience with other communications professionals at the STC-Philadelphia Metro Chapter Conference, to be held on March 26-27, 2010.

Don't delay, submit your presentation proposal now! Just go to www.stcpmc.org

The **deadline for submissions is January 15.**

P&P Q&A FROM THE LISTSERV

Maria Marquez recently asked the P&P LISTSERV the following question:

Hello P&P SIG;

I would like to know the criteria your company uses to determine when to notify employees of a policy/procedure revision and to whom is the notification disseminated (e.g., to a liaison, directly to employee).

Any information you can provide will be greatly appreciated. Thank you,

Maria Marquez, Corporate Procedures Analyst

Here are just a few of the responses she got:

Lori Masingil, Manager, Technical Communications :

At my organization, we post notification of all policy/procedure changes to our Intranet via an official announcement (titled a "Technical Communication Announcement," affectionately known as a "TCA."). Concurrent to posting, the notice is also emailed to key staff, generally managers, training coordinators, or a list of employees (generally supervisors) who have asked to be included on such announcements. Affected staff must read the announcement and the updated policy/procedure document; in some cases a training component is released in conjunction with the TCA.

Pamela Ovington, Technical Writer, Process Improvement:

We release an intranet memo once a week where each department lists new policy and procedure topics and announces changes to existing ones. Then, in the topic itself, we have a "What's new" section where we list the change. That stays posted for three months.

Jo Beth, SOC-LA:

Our process is pretty simple as our procedures apply to all employees. Our IT has set up 1 email address "Allemployees@company.com" for this process.

I use the email address to notify all employees every time a revised procedure is published to the Intranet. The email includes the major changes that were made.

Want help with your policy & procedure projects? Ask a friend...join and use the P&P Listserv today! See the P&P website at <http://www.stcsig.org/pp/resources/listserv.php> for instructions.
