STEPS & SPECS

Vol. 1, No. 1 The newsletter of the STC Policies and Procedures PIC April 1995

A Welcome Letter from the P&P PIC Manager

Sometimes It Takes Awhile . . .

In the case of the Policies and Procedures PIC, almost two years. But our PIC is now on a faster track with more than 170 members and its first newsletter—all within six months of being sanctioned by the STC board of directors.

During the policies and procedures networking luncheon held at STC's 1993 Annual Conference in Dallas, eight STC members agreed to support my offer to spearhead a PIC on policies and procedures.

At the 1994 conference in Minneapolis, we sought signatures petitioning the formation of the PIC which resulted in official PIC status in September 1994. In January of this year, team leaders were named to head key PIC activities.

It's a great pleasure to have this first edition of our newsletter available to share with PIC members and to introduce it to attendees at the 1995 conference in Washington, D.C.

Plans are forming for a survey and directory of our members. We also are laying the groundwork for public relations, programs and special projects.

I encourage you to share this newsletter with the policies and procedures people in your organization and with others who might benefit from or just be interested in policies and procedures. Spread the word to members of your STC chapter and members of other associations in which you participate.

Again, welcome to the start of the Policies and Procedures PIC—a group that needs people like us to better define the what, when, where, why and how of the policies and procedures field of technical communication. Your support and ideas will continue to be appreciated.

—Raymond E. Urgo
P&P PIC Manager

Introducing . . . Your PIC Team Leaders

The functions of the Policies and Procedures PIC have been divided into four teams: membership, newsletter, public relations, and programs and projects. Your team leaders are:

Membership

Kevin Schmidt works for Westinghouse Savannah River Company in South Carolina. He works on policies and procedures projects for the Energy Department. Kevin is a senior member of STC and affiliated with the South Carolina chapter.

Newsletter

Audrey Cielinski Kessler is owner of The Write Hand, a technical writing and desktop publishing company in Maryland. Audrey is a senior member of STC and is affiliated with the D.C. chapter.

Public Relations

Carol Carlson has owned Technical Writing Services, Inc., in Chicago for more than six years. She is an associate fellow of STC and is completing her term as direct sponsor to Region 4. Carol is a member of the Chicago chapter.

Programs & Projects

Diane Whitmer has chaired policies and procedures tabletopic discussions at the 1994 Annual Conference and is doing so again at this year's conference. Her work focuses on P&P for an ISO 9000 implementation project. Diane is a senior member of STC and affiliated with the Kansas City chapter.

PIC Manager

PIC manager is **Raymond E. Urgo,** owner of Urgo and Associates in Los Angeles. Raymond is a member of the Los Angeles chapter of STC.

Inside . . .

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Profile: Martha Collins

From High School Teacher to P&P Dynamo

by Pat Susin

Behind her soft-spoken drawl, you'll find a Southern Belle who also is a policies and procedures dynamo. Taking the long path that so many of us have traveled, **Martha Collins** used a degree in business education to capture her first job as a high school business education teacher.

She went on to gain valuable business experience in several diverse occupations. After leaving the classroom, she worked as an administrative assistant to a bank vice president, moving later into the position of human resources compensation analyst.

Next, Martha became an administrative assistant specializing in budgets while working as a civil servant in Germany. Upon returning to the United States, she climbed the corporate ladder of a major furniture retailer by progressing from administrative assistant to assistant buyer. From there, Martha moved to a chemical company as an administrative budget specialist.

In 1985, Martha moved to the Tampa, Florida, area and needed a job. General Mills was hiring. She approached them—"cold turkey"—but confidently. Happily for both Martha and General Mills, Martha's background added up to what the company needed. As a result, they offered her a technical writer position.

"When I accepted the job with General Mills," said Martha, I don't think I even knew what a technical writer did." Ten years later, Martha notes that she spends "too much time at work to be doing something I don't enjoy. And I've discovered I'm very good at this."

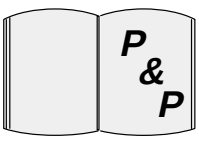
She added that the variety in her background gave her a basic understanding of business and that this benefits her as a policies and procedures writer.

"My varied experience has been very, very helpful to me. It has helped me to make sound judgments about what information my more than 5,000 users need."

The most challenging aspect of P&P writing, Martha said, is "getting it done in a timely manner." The best part about this type of work, she added, is being able to "put information together in a clear, logical manner."

Martha still lives in Tampa, where for the past seven years she has worked for the Big 6 accounting firm Price Waterhouse, which will be auditing the U.S. Congress. Martha and her staff specialize in publishing administrative and financial policies and procedures for Price Waterhouse offices worldwide.

***Pat Susin** is a policies and procedures writer at American Greetings in Cleveland, Ohio. Pat is a member of the Northeast Ohio chapter of STC.*



Book Briefs

General Information

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Page, Stephen Butler. *Business Policies and Procedures Handbook*. Englewood Cliffs, NJ: Prentice-Hall, 1984.

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Technical Communication and Policies and Procedures: What's the Relation?

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Frequently, I am asked about the relationship between policies and procedures and technical communication. My answer: They often are the same when it comes to communicating, different when it comes to subject matter, and sometimes complementary to each other's value. Simply put, they are similar, different and yet may work together.

Similar When Communicating

Technical and P&P documents are often similar in their principles and styles of communication compared with other forms of communication such as literature, creative writing and expository writing.

Simply put, technical and P&P documents are similar, different and yet may work together.

Technical and P&P communication are typically characterized by the use of graphics (e.g., drawings, tables, charts, illustrations), action titles, technical and organizational jargon, data, unambiguous language, varied formats, acronyms, and usually, procedures.

Differing Subject Matter

When it comes to subject matter, technical communication usually is about practical, industrial, or mechanical arts or applied sciences. Some examples:

- A user's manual for operating software
- Instructions for troubleshooting a VCR hookup
- Marketing literature on how a medical device works
- A scientific report about a litmus test's results
- A proposal for an environmental engineering project

P&P communication usually is about operating practices (e.g., standards, policies, processes, procedures, work instructions) for an organization's business performance.

Examples of policies include the following:

- A nondiscrimination commitment
- The use of information resources and customer service guarantees

Examples of processes include the following:

- Information flow for a purchase order among various departments
- Description of a manufacturer's quality management system

Examples of procedures or work instructions include the following:

- When and how a computer operator performs a system backup
- How a clerk sorts and transacts daily sales orders

Complementary

Sometimes technical communication and P&P communication work together. For example, a technical communicator may produce a manual or online help reference for using an accounting software package designed for the XYZ Company.

The information may include chapters or references about transacting accounts payable and receivable, generating accounting reports or searching for past dues by date.

The P&P communicator may then produce a manual or instructional material about when and how to use the software's features in the **context** of XYZ's business operations.

P&P communicators tell readers how to use a technical product in the context of daily business practices.

The information for that document may include policies and procedures for what types of reports are to be generated, when they are to be generated, who should receive them, what to do with the reports, when to generate them and who is authorized to access certain information.

In essence, the technical communicator tells readers how to use technical products (e.g., an accounting software package), while the P&P communicator tells readers how to use the product in the context of daily business practices.

To communicate other ideas about the relationship between technical communication and P&P, submit your ideas to the P&P PIC newsletter editor.

Raymond E. Urgo *is owner of Urgo and Associates, a member of the Los Angeles chapter of STC and manager of the Policies and Procedures PIC.*

❑ ***YES!*** *I want to join the STC Policies & Procedures PIC*

Name _____

Address _____

City _____ State _____ ZIP _____

Home Phone _____ Office Phone _____

Fax _____ E-Mail _____

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