Using Checklists to Get a Focus on the Editing Process for P&P Documents

by Elizabeth R. Turpin, Ph.D.

The use of checklists can be a valuable tool for the editing process. Whether you are an editor or a writer, checklists can help you maintain consistency, enable you to be more thorough with less effort, and allow you to edit multiple documents with greater efficiency and accuracy.

Document Assessment

A useful initial editing task is a careful reading of the entire document before meeting with the author or project group.

To prepare for the initial review, you need to be familiar with the following: audience and level, purpose of the document, and specification sheets for internal and/or external project-sponsor requirements.

Content Editing Checklist

The content, or substantive, editing phase typically includes estimating the amount of time and effort required to meet the needs of the intended audience.

A checklist for the content editing phase includes the following:

- Purpose of the document and its relationship to the audience
- Scope and coverage
- Relationship between ideas and paragraphs
- Intended level of meaning
- Coherence
- Authenticity and accuracy of content and references
- Overall style
- Logic of information sequence
- Persuasiveness of content and style
- Overall consistency
- Compliance with specifications

A Year in Review: P&P SIG Notes Accomplishments After Third Year in Existence

by Raymond E. Urgo

As the fiscal year closes, it is only fitting to review our accomplishments for the year and acknowledge our SIG's volunteers for their service.

In the P&P SIG's most recent report to the STC board, our group's overall status was rated as "excellent" for meeting expected levels of products and services to its members after its third year as a SIG.

Thank you to **Jerry Laing** and **Kevin Schmidt** of our membership team for enrolling about 100 new members, which brought our membership to an all-time high. Jerry developed a survey of member interests and experience in the P&P field, and the results are often used to respond to member requests for information or assistance.

In her first year as coordinator of programs and projects, **Jerri Houdayer** did an outstanding job of coordinating requests for proposals on P&P topics to be presented at the annual conference in Toronto last month.

The P&P progression session drew more than 60 participants—the largest ever for a session of its type. Jerri also coordinated the first P&P panel session for the Region 8 Conference earlier this year.

Nancy Ford Demeter, coordinator of public relations, re-

Member Profile: Stewart Bruner

Pioneer in the Field of Technical Writing

by Bonnie Zepka

A policies and procedures writer for Allied Signal in Tempe, Arizona, **Stewart Bruner** is the only writer in the corporate information technology group, a unit with 250 persons who provide computing services such as payroll processing and manufacturing support for the company's North American operations.

Bruner is responsible for maintaining a computer standards manual that supplies the control rules and regulations for customers to follow when sharing computer resources. He also documents high-level procedures related to running the computing business.

He began his career with the multinational conglomerate of more than 80,000 employees worldwide after graduating from college and the company was still known as Allied Chemical. Bruner worked in the Engineering Publications Department as one of 35 technical writers.

"I've been through a revolution in this field," said Bruner. "When I came to work at Allied Signal, I was one of the first college educated technical writers who had declared this as my profession."

Since Bruner began his current position three years ago, he has done what he describes as "heavy-duty" P&P work, including defining the process and initiating a procedures program where none existed. He added that his biggest technical challenge was the conversion to a Web-browsable electronic publication format. "My output is primarily electronic, and I only print a hardcopy each quarter for audit purposes."

Making the transition involved learning to use the company's mainframe rather than the PCs to which he had been accustomed. He then had to convert source documents from the mainframe, prompting him to spearhead efforts to convert to a desktop application.

The efforts proved fruitful, as Bruner now uses Microsoft Word and IBM BookManager BUILD for his P&P projects. When a document is finished, it is sent by FTP to a UNIX box where persons with a browser can view the document.

Not allowing material to "go stale," says Bruner, is the most significant improvement he has made to Allied's P&P process. He does so by emphasizing ongoing development and review.

"To ensure that the materials are reviewed," says Bruner, "I set a timer on the tracking spreadsheet to show the order in which the materials are coming up for review. The periodic review forces the issue of revisiting things that were once really hot" and ensures that process owners compare what a document says is being doing with what actually is being done.

Bruner knew he wanted to be a writer and discovered he had an aptitude and a talent for technical writing while pursuing an English major in college. It was a technical editing class designed to demonstrate clear communication to non-English majors that made Bruner certain of his career goal.

"I learned that I have the ability to do this stuff, and other people hate it. I decided I'd better get good at this."

He adds that "when you're a writer at your core, what you write about is secondary to your ability to gather facts."

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59 Join P&P SIG in February-May Period

by Jerry Laing

Membership in the P&P SIG increased by 59 persons since February, bringing total membership to 336. Welcome to the following new members:

- **Elizabeth Avvampato** (Canada)
- **Barbara Ballantyne** (Canada)
- **Julia Barrett** (CA)
- **Anne Becker** (FL)
- **Diana Bigham-Griffin** (IN)
- **Karen Boyett** (OK)
- **Stuart Burnfield** (Australia)
- **Leslie Bythewood** (MD)
- **Carole Clarke** (CA)
- **Roger Congress** (DC)
- **Jacquelyn Connell** (NV)
- **Reva Daniel** (MS)
- **Theresa Daus-Weber** (CO)
- **Sharlyn Dimick** (IL)
- **Mary Jude Eck** (NY)
- **Arlene Efurd** (OK)
- **J. Richard Fleming** (NJ)
- **Janet Forrester** (Canada)
- **Nicholas Gattuccio** (NC)
- **Sadie Gill** (TN)
- **Stephen Gillespie** (TN)
- **Sue Girgis** (Canada)
- **E. Gonzalez** (VA)
- **Michael Granat** (Australia)
- **Allison Hall** (VA)
- **Jim Hartling** (Canada)
- **Tabatha Helm** (IN)
- **Barbara Higgins** (FL)
- **Ina House** (Canada)
- **Thomas Hoyt** (OR)
- **Mandy Huang** (NY)
- **Roxanne Jones** (CA)
- **Jeffery Jorney** (MD)
- **Nancy Kayden** (MI)
- **Stephanie Klages** (MD)
- **Eileen Kohen** (IL)
- **Don Lau** (CA)
- **William Martin** (SC)
- **Kim MacMillan** (Canada)
- **Jack Massa** (GA)
- **Maryann Matuska** (AZ)
- **Nancy Mellert** (Canada)
- **Gordon Miller** (Canada)
- **Brian O'Malley** (Canada)
- **C. Dani Oddone** (DC)
- **Gary Powers** (NY)
- **Alexia Prendergast** (NC)
- **Kathi Reynolds** (NY)
- **Kathryn Dianne Roach** (ID)
- **Ralph Robinson** (Canada)
- **Dina Scaperotta** (NJ)
- **Michael Schaub** (Canada)
- **Param Sharma** (CA)
- **Lynn Cozette Smith** (NE)
- **Kathleen Stehly** (VA)
- **Tom Tomasovic** (NY)
- **MaryLouise Tucker** (Australia)
- **Katherine Wegner** (CO)
- **Prescott Williams** (PA)

Jerrold A. Laing is P&P SIG Membership team leader and a member of the San Gabriel (CA) chapter of STC.

Copy Editing Checklist

The copy editing phase involves scrutinizing the document for consistency and accuracy. A style sheet based on applicable specifications can help you identify and evaluate the types of errors needing correction and gauge how much time will be needed to complete the task. A list of copy editing errors that occur often in the type of documents you edit is particularly helpful.

The following are a few examples of items you might want to include on your copy editing checklist: spelling, capitalization, punctuation, grammar, syntax, usage of words and phrases, incorrect spacing, inconsistencies, and format requirements.

Be sure to adhere to the sequence and content of your editorial checklist. The more you rely on the list and even print copies to attach to each document the better you will train yourself to be consistent, alert and accurate.

Managing the Editorial Process

At this point in the assessment process, you may want to list all of the persons who may be involved in the approval, revision and production phases—everyone from the author, your supervisor and the project sponsor to graphic designers, proofreaders and the production manager. Doing so lets you more accurately estimate a completion date for the project.

Elizabeth R. Turpin, Ph.D. is a professor in the Department of Rhetoric and Literature at Ferris State University in Big Rapids, Michigan, and a member of the West Michigan Shores chapter of STC.

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vised our brochure and wrote an article about the SIG that was published in the November issue of *Intercom.* The brochure and article contributed to a surge of new members.

Through the able talents of **Kris Henige,** the SIG is nearing the completion of its first Web page.

Thanks to **Audrey Cielinski Kessler's** dedication to publication deadlines, our *Steps & Specs* newsletter continues to be published on time each quarter. The newsletter has been the key avenue for remaining in contact with our members and for sharing information with prospective members.

For the first time, the past year's newsletter included articles from non-STC authors. Audrey also has been working with the PR team to have the newsletter accessible through our Web page.

As a SIG, we have responded to more than 40 requests for information, advice and referrals concerning P&P communications.

Finally, a thank you is extended to our members at large for their support and shared information in promoting P&P as a discipline.

As the new fiscal year begins, the SIG's team leaders are planning ways to enhance our discipline through conference sessions, new information resources, and communication among members both online and through local chapters.

Raymond E. Urgo is principal of Urgo & Associates, a member of the Los Angeles chapter of STC and manager of the Policies and Procedures SIG.

To persons considering a technical writing career, Bruner recommends pursing a liberal arts degree because "when you're a specialist, you can only write about your specialty."

Bruner notes that he "bucked the trend" of specialization in the 1980s and remained a generalist. "I think this has been an asset because I approach each new thing that I write as a learning experience.

"You also have to be able to shed your self-consciousness about appearing clueless and have the desire to put together the picture in your head of what's happening." 🔖

Bonnie Zepka is a freelance writer in Louisville, Kentucky, and a member of the Kentucky chapter of STC.

HELP WANTED

☆ *P&P SIG Listserv Coordinator*

The P&P SIG is seeking a volunteer to develop and maintain a listserv dedicated to issues and concerns for the discipline of policies and procedures communication within STC. Advice and guidelines will be provided from other STC sources. If interested, contact **Raymond E. Urgo** at 213/876-2186 or rurgo@aol.com.

☆ *P&P SIG Data-Entry Assistance*

Volunteers are needed to enter data from the P&P SIG member survey. Volunteers will need an ACCESS database and preferably be located in the Los Angeles–Orange County area. This is a short-term project. If interested, contact **Raymond E. Urgo** at 213/876-2186 or rurgo@aol.com.

☆ *P&P SIG Membership Team*

P&P Membership Team needs ongoing help with sending out welcome letters/packages to new members. If you would like to help, contact **Jerry A. Laing** at jal_docs@linkonline.net or 818/445-0100.

☆ *P&P Presenters*

If you would like to deliver a presentation on P&P at the 1998 STC Annual Conference, contact **Jerri Houdayer** at 310/593-8996 or whodare@aol.com.

☆ *Style-Guide Development Assistance*

Burton A. Phillips of Ryder Systems Inc. is looking for samples of established P&P style guides to use as examples while the company develops its own style guide. If you can help, contact Phillips at Burton_A._Phillips%RYDERSYSTEMINC@rydernotes.com.

STEPS & SPECS

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